Electronic Research Administration
A program of the National Institutes of Health

NIH National Institutes of Health
Office of Extramural Research

FOAM User Guide

Revision:

June 13, 2019

CONTACT US

Document Comments:

We value your feedback on this document.

How are we doing? The Communications & Documentation Team of the electronic Research Administration (eRA) is dedicated to serving our community and welcomes your feedback to assist us in improving our user guides. Please send comments about the user guide to this address: eRACommunications@mail.nih.gov.

For general questions about this module and associated business processes:

Please contact your IC Coordinator. A list of IC Coordinators is available here: http://inside.era.nih.gov/techrep_list.cfm.

Troubleshooting support: Contact the eRA Help Desk:

Toll-free: 1-866-504-9552

Phone: 301-402-7469

TTY: 301-451-5939

Web:https://grants.nih.gov/support (Preferred method of contact)

Email:commons@od.nih.gov (for Commons Support)

Email:helpdesk@od.nih.gov (for IMPAC II Support)

Hours: Mon-Fri, 7:00 a.m. to 8:00 p.m. Eastern Time

DISCLAIMER STATEMENT

1 Table of Contents

1 Table of Contents **3**

1 Latest Updates **6**

1 Overview of FOAM **15**

2 Accessing FOAM **16**

2 FOAM User Roles and Privileges **18**

2.1 Task-based Privileges 20

3 My Inbox **24**

3.1 Actions 25

4 Task List tab **27**

4.1 Working with the Task List 28

4.2 Working with individual tasks 30

4.3 Task List tab 32

4.3.0.1 Filter and sort 35

4.4 Add Task 37

4.5 Task Detail 42

4.6 Task Detail: Task Actions tab 48

4.7 Task Detail: Task Checklist tab 50

4.8 Save as Model 52

4.9 Task Completion 53

4.9.0.1 Message 54

4 Create FOA **56**

5 FOAs **61**

5.1 Selections and Filters 61

5.2 Actions 63

5.3 Attachments tab 64

5.4 FOA Dashboard tab 65
5.4.0.1 Current Tasks 67
5.4.0.2 Recent Events 68
5.4.0.3 Milestones 69
5.4.0.4 Posting History 69
5.4.0.5 FOA Content 69
5.4.0.6 Processing Time 70
5.5 Exception Requests 70
5.5.0.1 Generate Memo 72
5.6 FOA Key Attributes tab: Overview 73
5.7 Multi-component tab 79
5.8 FOA Key Attributes: NIH Guide tab 81
5.9 AIDS Funding 85
5.10 FOA Content tab 87
5.10.0.1 Data Elements 89
5.10.0.2 Edit Modes 91
5.10.0.3 Note: About content locking: 91
5.10.0.4 Inline Comments 92
5.10.0.5 FOA Content Versions 93
5.11 Review Comments tab 97
5.11.0.1 Actions 98
5.12 Shared Interest tab 98
5.12.0.1 Notes: 99
5.13 Task List tab 100
5.13.0.1 Filter and sort 103
5.14 Transaction History 105

6 Reports **108**

6.1 Report Parameters 108

6.2 Report Output 112

7 Admin Dashboard **117**

7.1 Manage Document Templates 117

7.2 Manage Task List Models 118

7.2.0.1 Properties tab 120

Adding Publishing Rules 120

7.2.0.2 Task List Model tab 121

Actions 121

7.2.0.3 Task tab 122

8 Manage Document Templates **127**

8.1 Actions 127

8.2 Create Document Template 128

8.3 Clone Document Template 130

8.4 Document Template Key Attributes 131

8.4.0.1 Preview Template 134

8.5 Data Elements 134

8.6 Data Element Detail 135

8 Quick Start Guides **151**

1 Latest Updates

Updates and new features in the Funding Opportunity Announcement Module (FOAM) :

June 13, 2019

- Filter the FOAs list by FOA Label to find announcements belonging to initiatives such as HEAL or Alzheimer's.
- New AIDS Funding tab in FOA Key Attributes.
- When ICs adds themselves as participating organizations in the Shared Interest tab, the FOAM Admins (Guide Liaisons) of the FOA's Organization (primary IC) get e-mail notifications.

May 16, 2019

- FOA Labels:
  - Create and manage labels for FOAs.
  - Apply labels to FOAs in the Key Attributes tab.
- On Multi-component FOAs, you now must enter a name for each component. See Multi-component tab

Apr 4, 2019

- The FOA Content screen has been redesigned for better navigation.
- In the Task Notifications screen the *Include task assignees* checkbox will be disabled on "Comment Added" notifications to avoid sending duplicate notifications.
- Notifications for Agency task completion now give you the option to unsubscribe.

Feb 25, 2019

- FOAM Admins can add custom notifications to FOA tasks, specifying who should be notified for selected task events and due dates. See Task Notifications.
  And when you Save as Model a task list that contains tasks with custom notifications, the notification configuration will be preserved in task lists created from that model.
- A note on working with Task List Models: FOAM Admins, use the Manage Task List Models screen to view, create and manage task list models for your organization.

- IC users can now view all tabs of their IC's FOAs, not just the Key Attributes tab.

Jan 30, 2019

- The Review Schedule report can now be filtered by council round.

- The FOA Dashboard tab can now be viewed by all SME Reviewers.

- FOA Key Attributes, NIH Guide tab:
  - Removed rich text options from SEP Justification field.
  - In the *AIDS Applications Expected* drop-down menu, added the option "No AIDS Applications Expected."

Dec 14, 2018

- In the FOA Exception Requests tab, when you request a Limited Competition exception, you must now select the limited competition category from a drop-down menu.
- Also, the "Validate NIH Guide Attributes" Task Completion Requirement validates that all required exception justifications have been entered.

Nov 15, 2018

- New announcement type: Notice of Special Interest.

- New FOA template linked element type: *Components of Participating Organizations*: In the FOA Content, this element displays the issuing component name, followed by the names of all the participating organizations listed on the Shared Interest tab. See Create Data Element.

- Now, assignees on a task can add attachments to the FOA even if the task is not in progress.
- The FOA Contents screen displays a warning two minutes before your session times out: Click to renew the session. Also, FOAM automatically saves the content if the session does time out.
- In the FOA Key Attributes NIH Guide tab, new fields for CSR Review:
  - *Review Arrangement*: Select CSR, CSR SEP, or IC;
    and related field: *SEP Justification*.

  - *Expected Number of Applications*: Enter number of applications expected per round or per year.

  - *AIDS Applications Expected*: Indicate whether AIDS-related applications are expected;
    and related field: *Same locus of review for AIDS Applications*.

Oct 18, 2018

- In the My Inbox screen, removed the *Task Status* column and added an *Assigned To* column: The *Assigned To* column shows all users assigned to the task, including those assigned by name and those assigned by role (the first user that is assigned by name is listed first in the column).
- In My Inbox, replaced the *Task Start Date* column with *First Application Due Date*.
- In the My Inbox and Task List screens, added a new **Sub-Assignment** action to the *Actions* menu: Users who have assignment privileges on a task can select this action to add a sub-assignment to the task. Use sub assignments on tasks that are assigned by role to distribute them among the users in your organization.
- You can now filter FOAM reports to show only selected announcement types. See Report Parameters
- For FOA type OTA, the user cannot manually enter a FON: You must use the system-generated FON. See Create FOA

Sept 20, 2018

- You can now assign multiple lead authors to a FOA. See FOA Key Attributes.
- Agency Admins can now edit FOA policy language at any time (to deal with cases when editing is needed but no Edit Policy Language task is in progress).
- Added instructive text next to the *Purpose* field in the FOA Key Attributes screen: "Prior to starting shared interest, please provide a complete and descriptive purpose statement."
- You can now search activity code, organization, CFDA, and issuing component in lookup fields by any part of the description and code in the FOA Key Attributes and Shared Interest screens. The CFDA numbers are now sorted in ascending order.

Sept 6, 2018

- The *Organization* filter in the FOAs list now lets you toggle between searching for all FOAs in which an IC participated or only FOAs for which that IC is the issuing component.

- FOA Edit Modes — Agency Admins can manually turn on and off limited editing of the FOA content in order to prevent ICs from deleting comments or accepting/rejecting changes when returning edits to the Guide after addressing Guide recommendations, so that the Guide staff can easily see what was updated.
  Use the *Editing* drop-down menu at the top of the FOA Content screen to set the edit mode.

Aug 9, 2018

- Filter changes in the FOAs list:
  - Added an *Announcement Type* filter.
  - Added a **Reset Filter** button to return all filters to their defaults.

- *FOA Type* field changed to *Announcement Type* in the FOA Key Attributes screen.

- *Primary CFDA#* field added to the FOA Key Attributes screen so you can select the CFDA # for the FOA Issuing Component.

June 14, 2018

- The View links in the Review Comments screen now take you directly to the associated comment in the FOA Content screen.
- New FOA *Dashboard* tab provides a customizable view of FOA status. See FOA Dashboard

May 11, 2018

- When you enter a properly formed URL (http:// or https://) in a FOA Content field, FOAM automatically converts it into a hyperlink.
- Only admin users and users assigned to an in-progress task that has Accept/Reject Changes privilege can accept or reject changes to FOA Content.

Apr 13, 2018

- Restore previous versions of FOA Content.

- FOA Content tab, new Open/ Restricted Editing toggle: Click the 

buttons to switch between open and restricted editing: When editing is restricted, only Agency Admins and the eRA FOAM Admin can edit FOA Content and add or address comments.

- In the FOAs list screen, the FOA Type filter has been replaced by an Organization filter.
- Review tab renamed Review Comments.
- New field restrictions to protect OEP policy review:
  - NIH Guide tab: The *Parent Announcement* field can only be edited by Agency Admins and the eRA FOAM Admins.
  - FOA Key Attributes tab: For FOA types PA, PAR and PAS, the *FON* field can only be edited by Agency Admins and eRA FOAM Admin. If the issuing component is OD, the FON is editable only by Agency Admins and the eRA FOAM Admin.

Mar 15, 2018

- While a user is editing a section in the *FOA Content* tab, that section is locked for editing by other users. A lock message notifies you when another user has locked a section. See FOA Content
- Removable data elements: Template editors can designate data elements as 'Removable' to allow users to exclude them from FOA content exports (HTML, PDF, Word). See Data Element Detail. And see FOA Content for instructions on working with removable data elements.
- If you sort the FOA list by a single agency task, the *Agency Task* column will display the start date of the selected task, as in this example.
- Reports access: All FOAM users can now generate FOA Tracker, Phase-Category, and Review Schedule reports for their organizations. See Reports
- New Task Privileges:
  - Add Next Task Assignee — Allows the current task assignee to add assignees to the next task on *Task Completion* screen.
  - Delete Next Task Assignee — Allows the current task assignee to delete assignees from the next task on *Task Completion* screen. This task privilege should be used with Add Next Task Assignee privilege because it only allows the user to delete assignees that were added that way.
  - Edit Assignee — Allows the task assignee to add or delete assignees on the task.

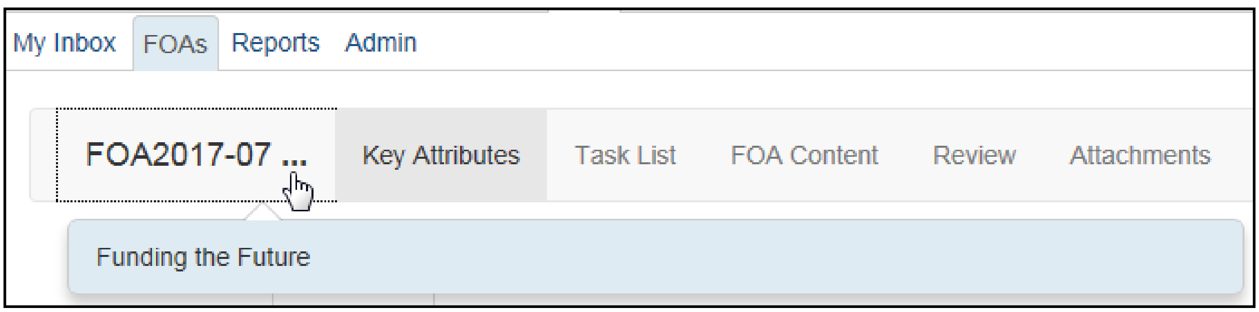
Feb 1, 2018

- The FOA *Lead Author* field defaults to the user who is creating the FOA. See Create FOA

- Tasks can now be set to Not Started regardless of any dependencies (previously, a task that was dependent on an In Progress task could not be set back to Not Started).
- The Save as Model screen displays the associated Phase Flow and FOA Type.
- ACF and CDC users can only add one publishing rule to an FOA template, and the only available attribute for the rule is FOA Type.
- FOAM Admins can now manage task list models in the Manage Task List Model screen.

Jan 4, 2018

- Inline Comments: When you comment on a data element you can now you can attach the comment to a specific line or place in the text. When you export the FOA Content to Word, the comment will be linked to the text it refers to. See FOA Content
- Delete multiple tasks from the Task List.
- FOA content that is editable is highlighted in the Word export of FOA content.
- The FOA Title now appears on all FOA tabs when you hover the mouse over the announcement number:



And note that the FOA Title field is limited to 250 characters.

Nov 16, 2017

- Add tables to rich-text fields in the FOA Content tab.
- New 'Organization Restricted' FOA attachment type that can only be viewed by users from the FOA's organization. See Attachments tab
- in the FOAs List screen, when you select 'Shared Interest' in the *Agency Tasks* filter, the Shared Interest Start Date column is displayed, showing the date when the Shared Interest task was set to In Progress.
- Export the FOAs list in Excel format.
- New data logic in the Create FOA screen: To create a FOA, you must first populate and lock the **Organization**, **FOA Type**, and **Activity Code** fields: Only after they are set and

locked will all of the other fields and the complete range of configuration options be displayed.

- Similar logic is used when you edit a FOA in the Key Attributes screen.

Nov 2, 2017

- Track receipt dates by council round for the FOA. See NIH Guide tab
- Generate Review Schedule report.
- Organizational divisions are now listed by abbreviation instead of by code in the FOAs screen and the Phase-Category report.
- New icons in My Inbox and the Task List screen.

Oct 13, 2017

- Generate the *HHS Forecast Export Report*. See Report Parameters
- Copy FOA. See FOAs
- *Grants.Gov Opportunity ID*: Enter opportunity ID to link the FOA to the published FOA on Grants.gov. See FOA Key Attributes
- New Task Completion Requirement: Validate NIH Guide Attributes. See Task Detail: Overview tab
- *Notice of Intent to Publish* FOAs are now marked as *cancelled* if the associated FOA is not published within 12 months. See FOA Key Attributes

Sept 28, 2017

- Create "Notice" FOA types:
  - Notice of Intent to Publish
  - Notice of Change to Funding Opportunity
  - Notice of Information
  - Request for Information
  - Request for Proposals
  - Policy Notice

    See FOA Key Attributes

- New *Division Referral Liaison* and *IC Approving Official*user roles
- New post-completion task actions: Shared Interest Period completion, Set Notice FON. See Task Actions

Sept 8, 2017

- Manage task list models at the Agency or IC level.
- New FOA Exception Requests tab
- Filter and sort preferences are now saved for duration of the current session. See My Inbox, FOA List
- New Post-completion task actions. For details see Task Actions:
    - Approve/Disapprove Limited Competition Exception
    - Approve/Disapprove Page Limit Exception
    - Lock/Unlock Attachments
    - Notify Guide Liaison and Guide Director on Agency Task completion

Aug 10, 2017

- Add components to create complex FOAs. See Multi-component tab
- Agency Admins and eRA FOAM Admins can manage, complete and delete all agency-level tasks. See Task Lists
- Post-completion action to propagate dependent due dates after task completion. See Task Actions tab
- Users with the FOAM_ADMIN role are required to use a model for their task lists. See Create Task List
- Filter FOAs list by issuing component. See FOAs

July 26, 2017

Workflow and look-and-feel changes to these screens:

- Add Task
- Create Task List
- FOAs
- FOA Key Attributes tab
- FOA NIH Guide tab

- FOA Shared Interest tab
- My Inbox

June 26, 2017

- FOAM integration with the NIH Guide Publishing System (GPS). See FOA Key Attributes tab: NIH Guide

May 8, 2017

- Export Phase-Category report to PDF. See Report Details
- Options to propagate dependent due dates when updating a single task due date. See Task Detail
- Workdays are used to calculate deltas between due dates. See Task List
- A new eRA FOAM Admin role to help with support the system. See FOAM User Roles

January 26, 2017

Initial Publication — eRA is excited to announce the launch of a new Funding Opportunity Announcement Module (FOAM), which will enable Guide Liaisons to collaborate with others in their ICs to develop funding opportunity announcements (FOAs) for submission to the Guide Publishing System (GPS). The system gives staff the ability to internally plan and track the FOA lifecycle and create FOAs. Future development will allow for multi-level review, revision and approval of FOAs along with supporting direct submission of FOAs to the Guide Publishing System.

1 Overview of FOAM

The Funding Opportunity Announcement Module (FOAM) is designed to help the ICs at NIH and our agency partners in developing, reviewing, approving and publishing Funding Opportunity Announcements (FOAs).

Features:

- The ability to establish, track, visualize, and monitor the FOA lifecycle, including critical business process events and deadline dates.
- Configurable, reusable task workflows by IC.
- The ability to Define task details including due dates, milestones, expiration dates, privileges, assignments, dependencies, and phases.
- Customizable and editable content that provides a platform for online collaboration for developing defined content that conforms to built-in agency-level FOA templates.
- Provides graphic display capability to visually display data.

Benefits:

- Streamlines the process of creating a FOA.
- Adds graphic display capability and other visual representations of data for FOAs, such as a display of milestones to monitor
- Improves tracking and reporting by marking critical business process events and deadline dates.
- Enables online collaboration with colleagues to develop and share data content.
- Enables parallel reviews, comments and change tracking, along with the capability to upload and save documents.
- Sends notifications to users based on events such as: FOA review/approval required; FOA reviewed/approved; milestone approaching; milestone missed.

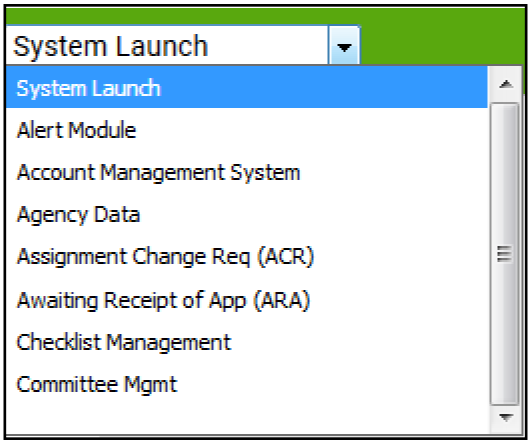
Who can use FOAM?

- Program Officials and others involved with the FOA development process.
- FOA coordinators and NIH Guide Liaisons need the FOAM_ADMIN role. Other contributors receive access when assigned FOA tasks.
- OEP Policy Reviewers

2 Accessing FOAM

Use one of these methods to access FOAM from the eRA intranet:

- Select FOAM from the **System Launch** drop-down menu, shown here:

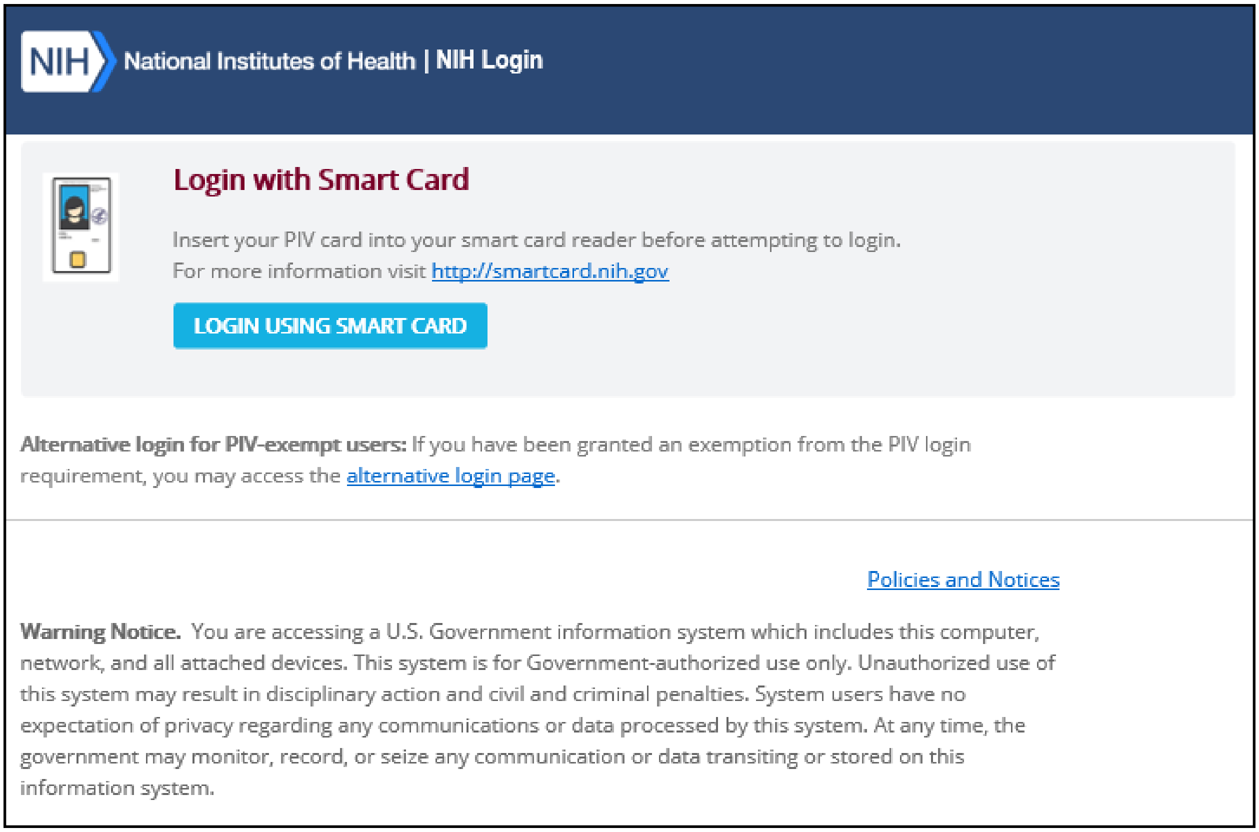


- Or: Locate FOAM in the *eRA Modules and Services* section and click the **Launch** link, as shown here: 

- Or: If you're already logged in to the eRA application suite, click the *FOA* tab on the menubar at the top of the screen.

- Or: Navigate your browser to https://public.era.nih.gov/foa.

When you take one of these actions, the Login screen opens, shown here.



Enter your PIV card and PIN number

Upon successful authentication, the system opens the FOAM My Inbox screen.

2 FOAM User Roles and Privileges

The following user roles are available for FOAM:

NOTE: In this table, the **FOAM Role** column lists the role name as it appears in FOAM; the **AMS Role Name** is the name used in the Account Management System.

FOAM User Roles

FOAM Role	AMS Role Name	Description
AREA SME	FOAM_AREA_SME	Checks the FOA for the AREA subject matter compliance.
Clinical Trial SME	FOAM_CLINICAL_ TRIAL_SME	Checks the FOA for the Clinical Trial subject matter compliance
Communications SME	FOAM_ COMMUNICATIONS_ SME	Checks the FOA for Communications subject matter compliance
Conferences SME	FOAM_ CONFERENCES_SME	Checks the FOA for the Conferences subject matter compliance.
Cooperative Agreements SME	FOAM_ COOPERATIVE_ AGGREMENT_SME	Checks the Cooperative Agreements subject matter compliance.
CSR Receipt Date Approver	CSR_RECEIPT_ DATE_APPROVER	Responsible for approving the CSR Receipt date for FOAs.
Data Sharing SME	FOAM_DATA_ SHARING_SME	Checks the FOA for the Data Sharing subject matter compliance.
Division Referral Liaison	FOAM_DIVISION_ REFERRAL_LIAISON	Coordinates FOA referral activities within the division.
ERA SME	FOAM_ERA_SME	Checks the FOA for the eRA subject matter compliance.
Evaluation SME	FOAM_ EVALUATION_SME	The Evaluation SME role checks the FOA for the Evaluation subject matter compliance.
FOAM Admin	FOAM_ADMIN	Sets up and manages FOA records for their agencies
FOAM Agency	FOAM_AGENCY_	Assists a GrantSolutions Agency partner with FOAM configuration. Admin user at the agency level

FOAM User Roles

FOAM Role	AMS Role Name	Description
Admin	ADMIN	with ability to set up Agency task lists
FOAM GS Admin	FOAM_GS_ADMIN	GrantSolutions admin user. Manages FOAs and task lists for their IC. Manages the publication of the FOA to Grants.gov and GrantSolutions.
FOAM GS Agency Admin	FOAM_GS_ AGENCY_ADMIN	GrantSolutions admin user. Manages FOAs and task lists for their Agency. Manages the publication of the FOA to Grants.gov and GrantSolutions.
FOAM Opportunity Template Role	FOAM_ OPPORTUNITY_ TEMPLATE_ROLE	GrantSolutions template editor.
FOAM Policy Reviewer	FOAM_POLICY_ REVIEWER	Checks the FOA for policy compliance.
FOAM Publisher	FOAM_PUBLISHER	Can release FOA for publication to grants.gov and NIH guide
FOAM Template Editor Role	FOAM_TEMPLATE_ EDITOR_ROLE	Manages document templates for their ICs: Can create/edit template key attributes and publish/unpublish templates
Guide Management Analyst	FOAM_Guide Management Analyst	Reviews the FOA for compliance.
Human Subjects SME	FOAM_HUMAN_ SUBJECTS_SME	Checks the FOA for a Human Subjects subject matter compliance.
IC Approving Official	IC Approving Official	Approves limited competition and page limit exception requests for your IC.
OER Leadership	FOAM_OER_ Leadership	Makes executive decisions on FOAs.
OPERA Grants Policy SME	FOAM_OPERA_ GRANTS_POLICY_ SME	Checks the FOA for the OPERA Grants Policy subject matter compliance.
OPERA RFI	FOAM_OPERA_RFI_	Checks the FOA for the OPERA RFI subject matter compliance.

FOAM User Roles

FOAM Role	AMS Role Name	Description
SME	SME	
Quality Control Officer	FOAM_QUALITY_ CONTROLLER	Reviews the FOA prior to publication in FOAM.
Receipt & Referral SME	FOAM_RECEIPT_ REFERRAL_SME	Checks the FOA for the Receipt & Referral subject matter compliance.
Referral Clearance	FOAM_REFERRAL_ CLEARANCE	Checks the FOA for referral compliance.
Research Training SME	FOAM_RESEARCH_ TRAINING_SME	Checks the FOA for the Research Training subject matter compliance.
Review Policy SME	FOAM_REVIEW_ POLICY_SME	Checks the FOA for the Review Policy subject matter compliance.
Small Business SME	FOAM_SMALL_ BUSINESS_SME	Checks the FOA for the Small Business subject matter compliance.
Workforce Diversity SME	FOAM_ WORKFORCE_ DIVERSITY_SME	Checks the FOA for the Workforce Diversity subject matter compliance.

2.1 Task-based Privileges

In addition to defined FOAM user roles, all eRA users can be assigned to tasks on individual FOAs.

And tasks can be used to give system privileges to the task assignee while the task is in progress.

Depending on the role of the user who's configuring the task, the following privileges may be available to be granted to task assignees:

FOAM Task Privileges

Privilege	Description	Who can assign?
Add Next Task Assignee	Allows the current task assignee to add assignees to the next task on Task Completion screen.	all Admin roles
Delete Next	Allows the current task assignee to delete assignees from the next	all Admin

FOAM Task Privileges

Privilege	Description	Who can assign?
Task Assignee	task on Task Completion screen. Note: Only allows the user to delete assignees that were added with the "Add Next Task Assignee" privilege	roles
Edit Assignee	Allows the task assignee to add or delete assignees on the task.	all Admin roles
Address Comments	Allows marking comments as addressed.	all Admin roles
Edit Due Date	Allows updating the due date for a task.	all Admin roles
Edit FOA Content	Allows assignee to edit FOA content. Note: This privilege is required in order to access and add inline comments.	all Admin roles
Edit Key Attributes	Allows assignee to edit the key attributes of the FOA.	all Admin roles
Accept/Reject Edits	Allows accepting or rejecting updates to the FOA content.	all Admin roles
Review Comments	Allows to comment on the FOA content and reply to existing comments.	all Admin roles
Edit Policy Language	Allows assignee to edit the policy language on the FOA content.	Agency Admin role
Edit Publication Setup	Allows assignee to edit the publication to grants.gov tab.	GS Admin role
Publish Forecast Record	Allows publishing the forecast to grants.gov.	GS Admin role
Publish Opportunity	Allows publishing the opportunity to grants.gov.	GS Admin role
Publish to GMM	Allows publishing the opportunity to the Grants Management Module	GS Admin role

For instructions on assigning task privileges, see Task Detail.

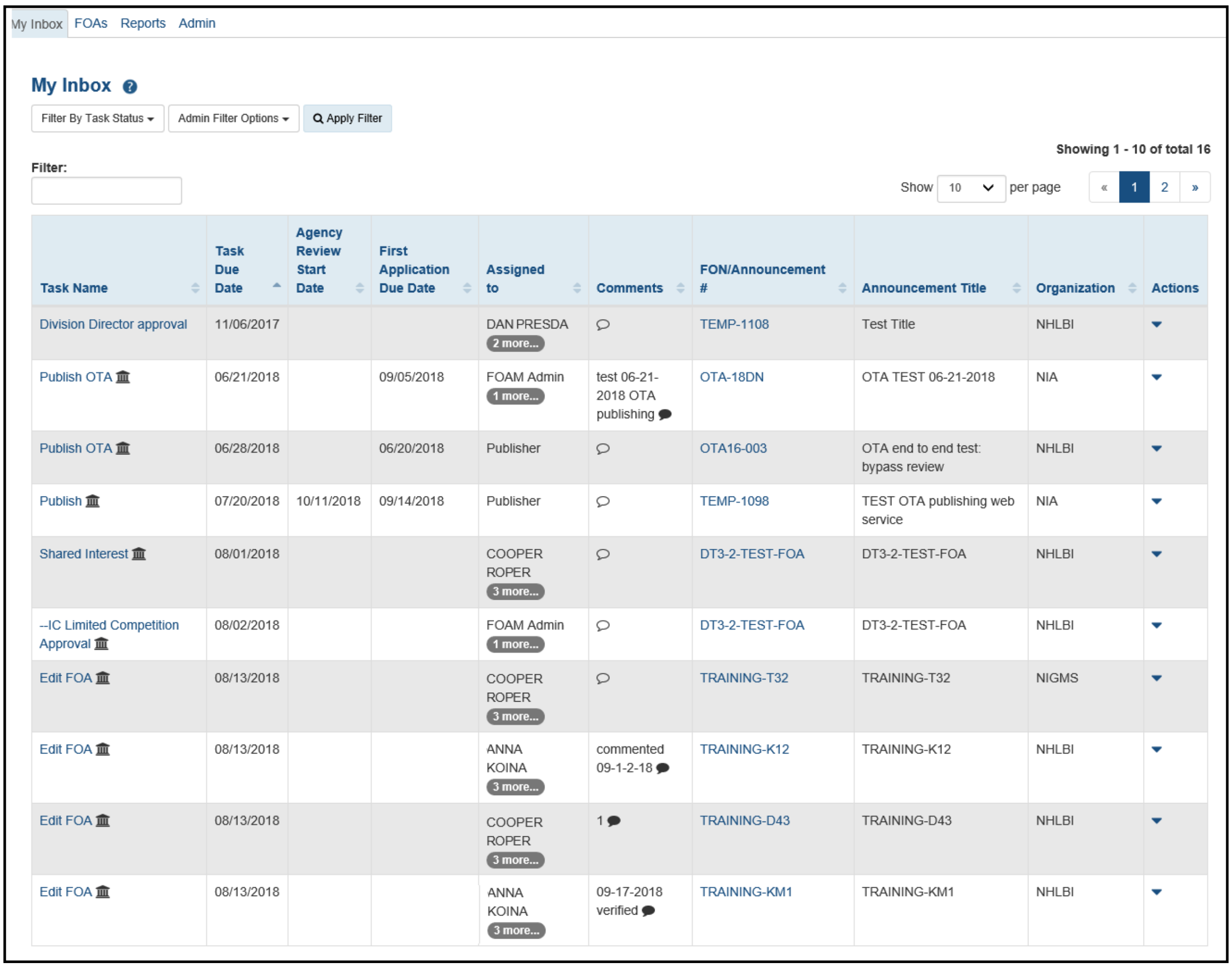
3 My Inbox

My Inbox is the opening screen when you access FOAM. You can also click the *My Inbox* tab in the top nav bar to open your inbox, as shown below.

And use the other links in the top nav bar to navigate to the other main FOAM screens:

- FOAs — Create and manage FOAs
- Reports — Create and manage Reports
- Document Templates — Create and manage Document Templates

Your Inbox displays the pending FOA tasks that have been assigned to you, as shown here:

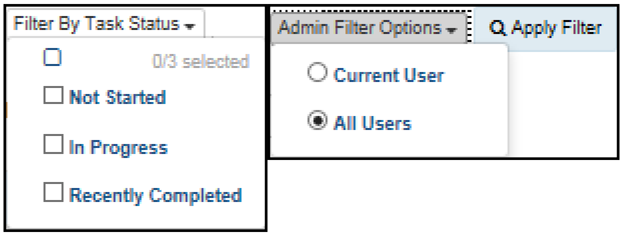


Task Name	Task Due Date	Agency Review Start Date	First Application Due Date	Assigned to	Comments	FON/Announcement #	Announcement Title	Organization	Actions
Division Director approval	11/06/2017			DAN PRESDA 2 more...		TEMP-1108	Test Title	NHLBI	
Publish OTA	06/21/2018		09/05/2018	FOAM Admin 1 more...	test 06-21-2018 OTA publishing	OTA-18DN	OTA TEST 06-21-2018	NIA	
Publish OTA	06/28/2018		06/20/2018	Publisher		OTA16-003	OTA end to end test: bypass review	NHLBI	
Publish	07/20/2018	10/11/2018	09/14/2018	Publisher		TEMP-1098	TEST OTA publishing web service	NIA	
Shared Interest	08/01/2018			COOPER ROPER 3 more...		DT3-2-TEST-FOA	DT3-2-TEST-FOA	NHLBI	
--IC Limited Competition Approval	08/02/2018			FOAM Admin 1 more...		DT3-2-TEST-FOA	DT3-2-TEST-FOA	NHLBI	
Edit FOA	08/13/2018			COOPER ROPER 3 more...		TRAINING-T32	TRAINING-T32	NIGMS	
Edit FOA	08/13/2018			ANNA KOINA 3 more...	commented 09-1-2-18	TRAINING-K12	TRAINING-K12	NHLBI	
Edit FOA	08/13/2018			COOPER ROPER 3 more...	1	TRAINING-D43	TRAINING-D43	NHLBI	
Edit FOA	08/13/2018			ANNA KOINA 3 more...	09-17-2018 verified	TRAINING-KM1	TRAINING-KM1	NHLBI	

Filter and Sort:

By default the inbox shows only your pending tasks (*In Progress* or *Not Started* status) — when you complete a task, it is removed from your inbox.

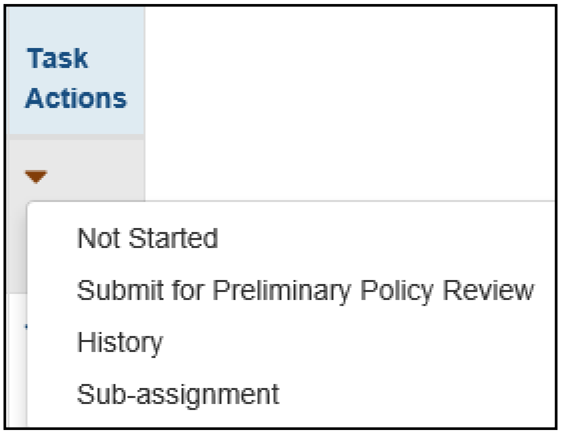
But you can use the **Filter** drop-down menus to choose which task statuses you want to display in this session, and whether to show tasks for only yourself or for all users. Click to open the menus and use the checkboxes to select, then click **Apply Filter** as shown here:



To sort the results, click the up or down arrows in the column headers: The new sort order will be used for the rest of the session.

3.1 Actions

- Click a task name to open the [Task Detail] screen and review or complete the task.
- Click a comment icon to [add a comment].
- The *Assigned To* column shows all users assigned to the task, including those assigned by name and those assigned by role (the first user that is assigned by name is listed first in the column). If there are multiple assignees, the field will have a gray bubble indicating how many more assignees there are:  Hover your mouse over the bubble to see all assignees.
-
- Look for the agency icon: to quickly spot agency tasks,
- Click a FON/FOA # to open the [FOA Key Attributes] screen.
- Or select one of these actions from the **Task Actions** menu, shown here:



Note: The choices available in this menu depend on your user role and the status of the task, but you may see some or all of the following actions:

- **Start Progress** — This is the first step for working on a task: The task must be in progress before you can complete it,[1] add comments, or perform actions for which the task grants you permission, such as adding assignees or editing task content. See Task Detail for more information.
- **Not Started** — Change an in-progress task back to Not Started state. (available to FOAM_ ADMIN users only)
- **Complete** — Click to mark the task complete in the Task Completion screen. If the completed task is a phase gate, the FOA moves to the next phase.
- **History** — View all past activity on the task in the Task History screen.
- **Delete Task** — Permanently delete the task. (available to FOAM_ADMIN users only)
- **Sub-Assignment** — Users who have assignment privileges on a task can select this action to add a sub-assignment to the task. Use sub assignments on tasks that are assigned by role to distribute them among the users in your organization.
  To create a sub-assignment, click this action and then select specific users from a pop-up window. (FOAM presents you with a list of users in your organization who have one of the roles required by the task.)

[1] *Except: FOAM Admins can complete tasks that are Not Started as long as they do not have any uncompleted mandatory dependencies.*

4 Task List tab

Task Lists (also called timelines) are ordered workflows of the tasks required to build the FOA.

Click the **Task List** tab in the FOA screen to create and manage task lists for the FOA:

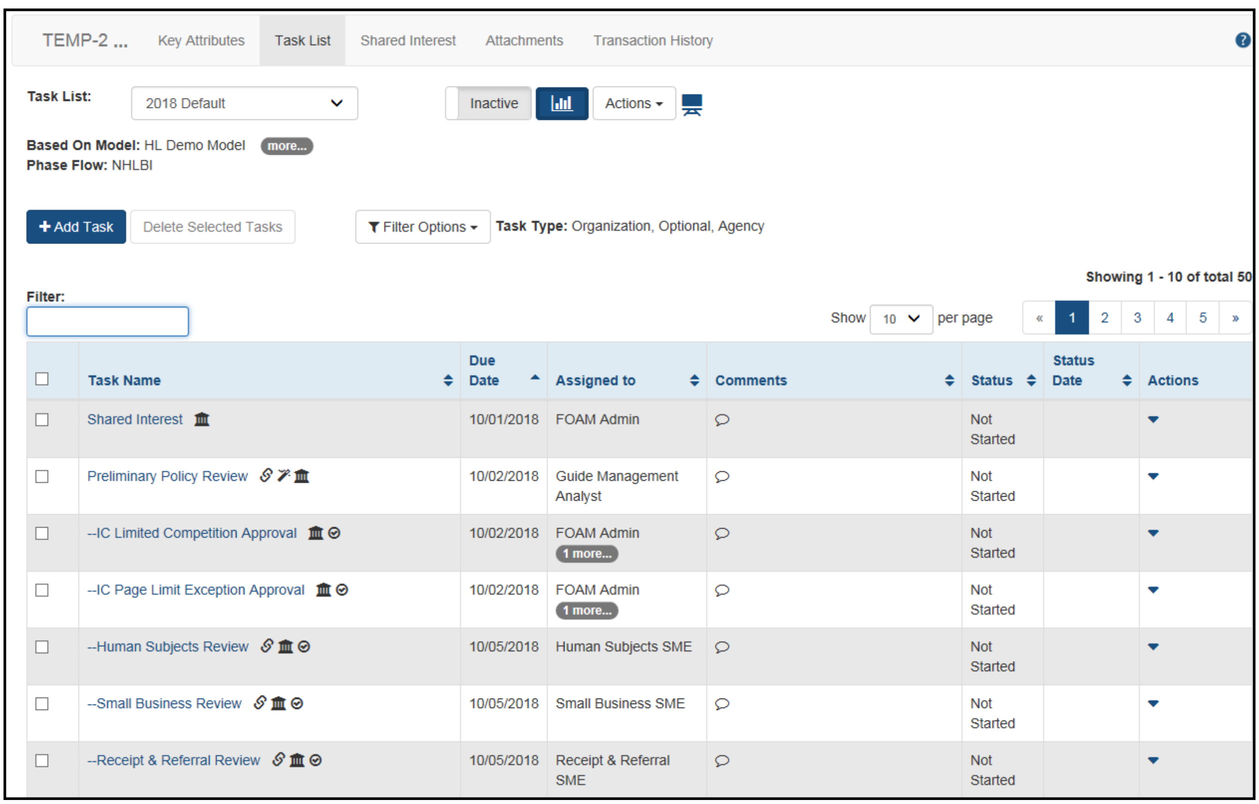
- If the FOA has an existing task list, clicking the **Task List** tab opens the Task List screen, as shown below.

- If the FOA does not yet have a task list, clicking the **Task List** tab opens the Create Task List screen instead.

Use the *Task List* screen to create and manage FOA task lists.

You can create multiple versions of a task list to consider different timeline options for developing the FOA or to compare a reference version of the timeline to the actual conditions. The task list that is currently being used to track the FOA development process is called the "active" task list.

See below for instructions on working with task lists.



4.1 Working with the Task List

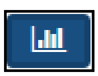
Click the **Task List** drop-down menu to select which task list to display. If an active task list exists, it is selected by default.

The **Active** button 

is present on active task lists, and the **Inactive** button 

is present on inactive tasks list. Use these buttons to toggle the active/inactive status of the task list:

- Click the **Inactive** button to make an inactive task list active: that is, to make it the official task list in use now to guide the FOA development process.
- Click the **Active** button to deactivate an active list. Note: You cannot deactivate a task list that has an agency task in progress.
- **Note**: Once the task list becomes active, work can be performed on its tasks and the first mandatory task on the list is set to *In Progress*.
- **Note**: If another task list was active, when a new task list becomes active, the previous task list is set to inactive and all its tasks are set to *Not Started*.

Click the **graph** button  to open a graph view showing the progress of the tasks in this task list. (**Note**: Only available if the task list includes at least one milestone task)

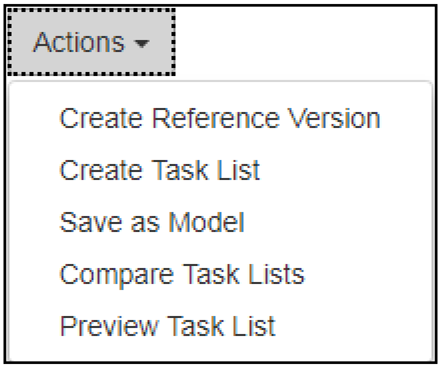
Click **Add Task** 

to open the Task Detail screen and add a new task to the task list.

To delete one or more tasks, use the checkboxes at the left to select the tasks, then click **Delete Selected Tasks**: 

.

Click the **Actions** button to select one of these actions in the Actions menu:

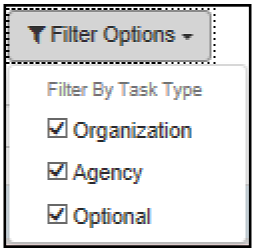


NOTE: The actions available in this menu depend on your user role and the status of the task list. Some or all of the following actions may be available:

- **Create Reference Version** — Click to create a reference version (a snapshot) of the active task list to use for auditing purposes. (**Note**: This action only available to the admin user)
- **Create Task List** — Click to generate a new task list. (**Note**: This action only available to admin users)
- **Save as model** — Click to save the task list you're viewing as a model to use when creating future task lists with the **Create Task List** action. (Note: This action only available to admin users). See Save as Model for information on creating a new task list based on a model.
- **Compare Task Lists** — Click to select two task lists to compare. (**Note**: only available if more than one version of the task list exists)
- **Preview Task List** — Click to generate a detailed overview of all tasks in the list.
- **Sub-Assignment** — Users who have assignment privileges on a task can select this action to add a sub-assignment to the task. Use sub assignments on tasks that are assigned by role to distribute them among the users in your organization.
  To create a sub-assignment, click this action and then select specific users from a pop-up window. (FOAM presents you with a list of users in your organization who have one of the roles required by the task.)

Filter and sort

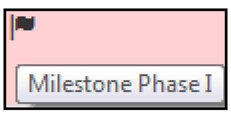
- Open the *Filter Options* menu to select the task types you want to see, as shown here:

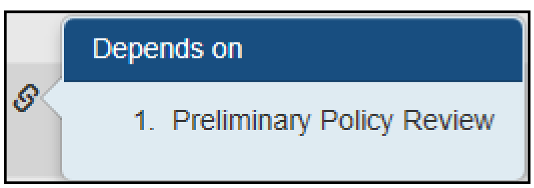
  

  Note: The *Filter Options* menu is not available for GrantSolutions users.
- Or type text in the *Filter* box to see only tasks that have the filter text in some field.
- Click the arrows at the top of the columns to sort the task grid by that property.

4.2 Working with individual tasks

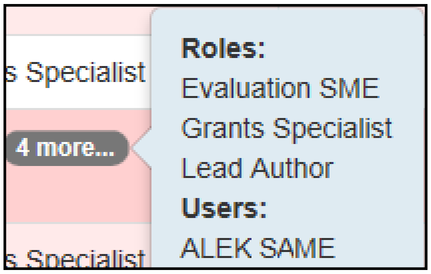
You can perform the following actions on the tasks in the task grid:

- Click the task name to view or edit the task in the *Task Detail* screen.
- The flag icon indicates milestone tasks. Roll over the icon to see which task phase it's in, as shown here: 

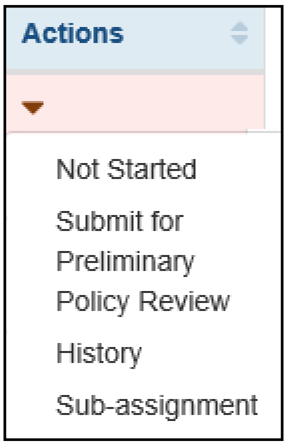
- The link icon  indicates dependent tasks. Roll over it to see the task this task depends on, as shown here: 

- Click the comment icon  to add a comment in the Task Comments screen. (**Note:** When you add a comment on a task, the task assignee receives a notification.)
- Other icons identify optional tasks:  , agency tasks:  , and tasks set to autostart when the task they're dependent on is completed: 

- The *Assigned to* column lists the task assignee. If there's more than one assigned person or role, a bubble in the field tells you how many. Roll over it to see them, as shown here:



- Select from the following actions in the **Actions** menu at the right side of the grid, shown here:



NOTE: The actions available for a task depend on your user role and the current task status. Some or all of the following actions may be available for a given task:

- **Not Started** — Sets the task status to Not Started. **Note**: only available to FOAM Admins.
- **Start progress** — Sets the task (set the task status to *In Progress*). **Note**: Only FOAM Admins can start a task.
- **Complete** — Sets the task status to Completed. **Note**: only available to FOAM Admins.
- **Submit for Policy Review** — Submit to OEP for policy review. **Note**: only available to FOAM Admins.
- **Delete task** — Deletes the task. **Note**: not available for in-progress, completed, or expired tasks.
- **History** — Click to open the Task History screen.

NOTE: For "Agency" task types, users with the Agency Admin or eRA FOAM Admin user role can act on the task (Start it, set it to Not Started, Delete it or Complete it) even if the task is not assigned to them.

4.3 Task List tab

Task Lists (also called timelines) are ordered workflows of the tasks required to build the FOA.

Click the **Task List** tab in the FOA screen to create and manage task lists for the FOA:

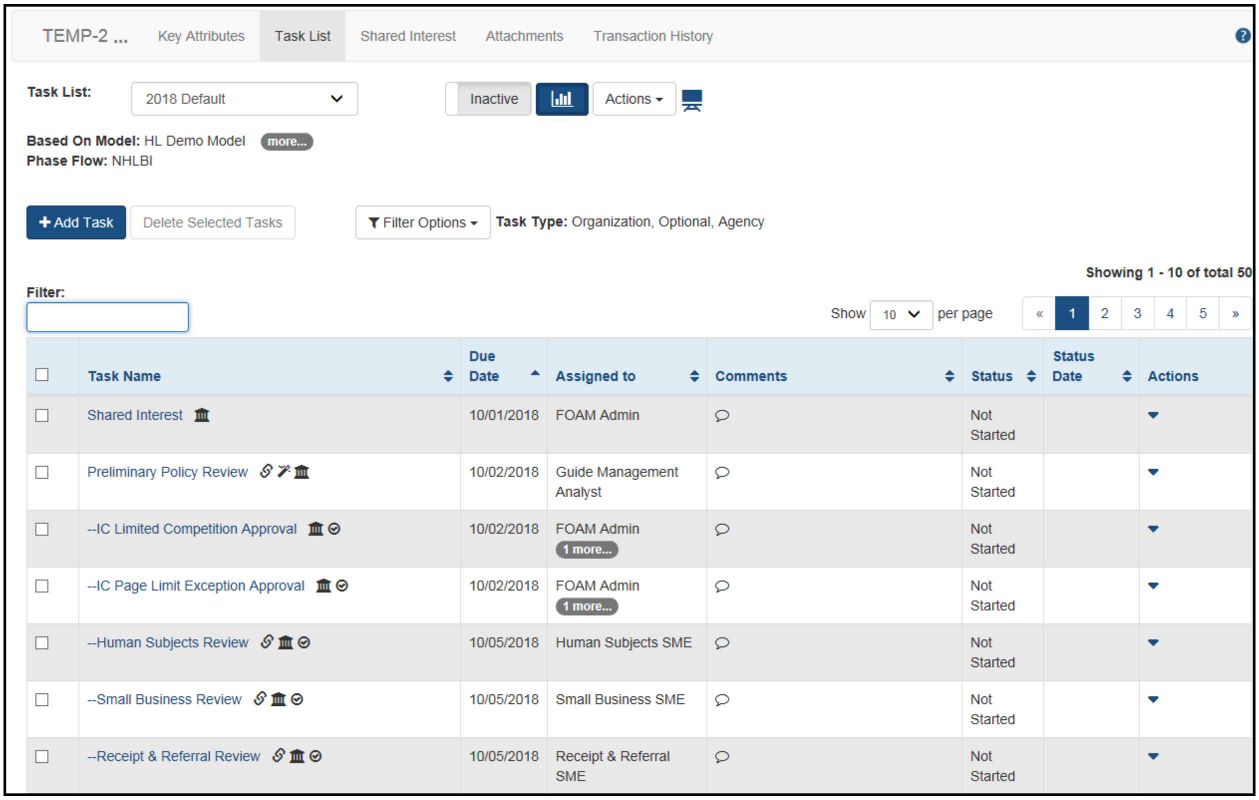
- If the FOA has an existing task list, clicking the **Task List** tab opens the Task List screen, as shown below.

- If the FOA does not yet have a task list, clicking the **Task List** tab opens the Create Task List screen instead.

Use the *Task List* screen to create and manage FOA task lists.

You can create multiple versions of a task list to consider different timeline options for developing the FOA or to compare a reference version of the timeline to the actual conditions. The task list that is currently being used to track the FOA development process is called the “active” task list.

See below for instructions on working with task lists.



Working with the Task List

Click the **Task List** drop-down menu to select which task list to display. If an active task list exists, it is selected by default.

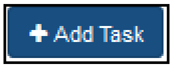
The **Active** button 

is present on active task lists, and the **Inactive** button

is present on inactive tasks list. Use these buttons to toggle the active/inactive status of the task list:

- Click the **Inactive** button to make an inactive task list active: that is, to make it the official task list in use now to guide the FOA development process.
- Click the **Active** button to deactivate an active list. Note: You cannot deactivate a task list that has an agency task in progress.
- **Note**: Once the task list becomes active, work can be performed on its tasks and the first mandatory task on the list is set to *In Progress*.
- **Note**: If another task list was active, when a new task list becomes active, the previous task list is set to inactive and all its tasks are set to *Not Started*.

Click the **graph** button  to open a graph view showing the progress of the tasks in this task list. (**Note**: Only available if the task list includes at least one milestone task)

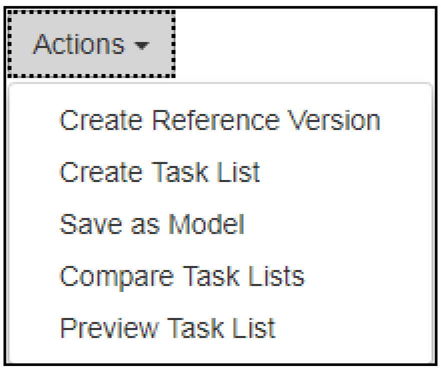
Click **Add Task** 

to open the Task Detail screen and add a new task to the task list.

To delete one or more tasks, use the checkboxes at the left to select the tasks, then click **Delete Selected Tasks**: 

.

Click the **Actions** button to select one of these actions in the Actions menu:



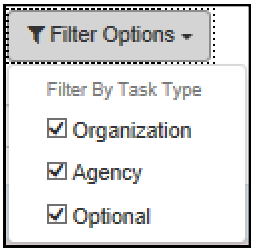
NOTE: The actions available in this menu depend on your user role and the status of the task list. Some or all of the following actions may be available:

- **Create Reference Version** — Click to create a reference version (a snapshot) of the active task list to use for auditing purposes. (**Note**: This action only available to the admin user)
- **Create Task List** — Click to generate a new task list. (**Note**: This action only available to admin users)
- **Save as model** — Click to save the task list you're viewing as a model to use when creating future task lists with the **Create Task List** action. (Note: This action only available to admin users). See Save as Model for information on creating a new task list based on a model.
- **Compare Task Lists** — Click to select two task lists to compare. (**Note**: only available if more than one version of the task list exists)
- **Preview Task List** — Click to generate a detailed overview of all tasks in the list.
- **Sub-Assignment** — Users who have assignment privileges on a task can select this action to add a sub-assignment to the task. Use sub assignments on tasks that are assigned by role to distribute them among the users in your organization.
  To create a sub-assignment, click this action and then select specific users from a pop-up

window. (FOAM presents you with a list of users in your organization who have one of the roles required by the task.)

4.3.0.1 Filter and sort

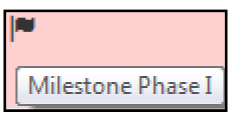
- Open the *Filter Options* menu to select the task types you want to see, as shown here:

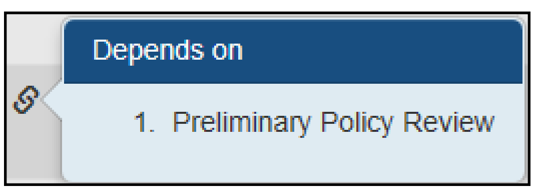
  

  Note: The *Filter Options* menu is not available for GrantSolutions users.
- Or type text in the *Filter* box to see only tasks that have the filter text in some field.
- Click the arrows at the top of the columns to sort the task grid by that property.

Working with individual tasks

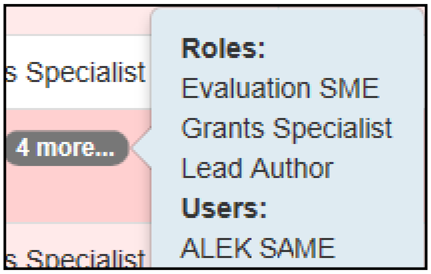
You can perform the following actions on the tasks in the task grid:

- Click the task name to view or edit the task in the *Task Detail* screen.
- The flag icon indicates milestone tasks. Roll over the icon to see which task phase it's in, as shown here: 

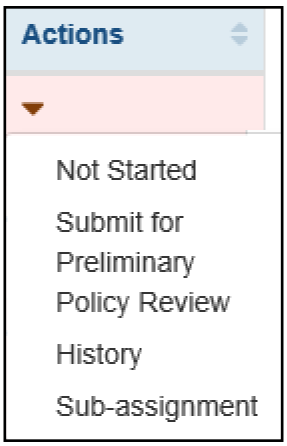
- The link icon  indicates dependent tasks. Roll over it to see the task this task depends on, as shown here: 

- Click the comment icon  to add a comment in the Task Comments screen. (**Note:** When you add a comment on a task, the task assignee receives a notification.)
- Other icons identify optional tasks:  , agency tasks:  , and tasks set to autostart when the task they're dependent on is completed: 

- The *Assigned to* column lists the task assignee. If there's more than one assigned person or role, a bubble in the field tells you how many. Roll over it to see them, as shown here:



- Select from the following actions in the **Actions** menu at the right side of the grid, shown here:



NOTE: The actions available for a task depend on your user role and the current task status. Some or all of the following actions may be available for a given task:

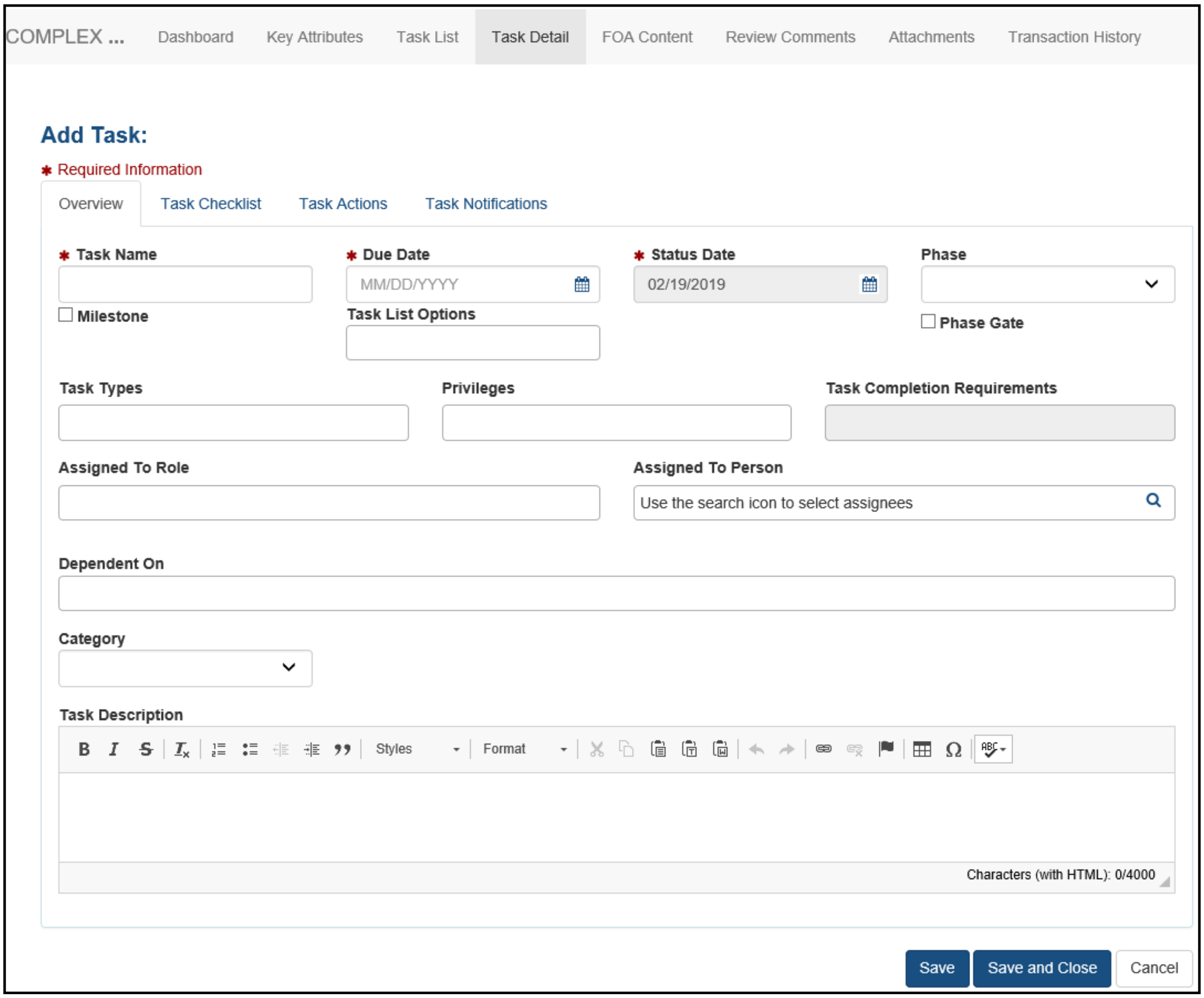
- **Not Started** — Sets the task status to Not Started. **Note**: only available to FOAM Admins.
- **Start progress** — Sets the task (set the task status to *In Progress*). **Note**: Only FOAM Admins can start a task.
- **Complete** — Sets the task status to Completed. **Note**: only available to FOAM Admins.
- **Submit for Policy Review** — Submit to OEP for policy review. **Note**: only available to FOAM Admins.
- **Delete task** — Deletes the task. **Note**: not available for in-progress, completed, or expired tasks.
- **History** — Click to open the Task History screen.

NOTE: For "Agency" task types, users with the Agency Admin or eRA FOAM Admin user role can act on the task (Start it, set it to Not Started, Delete it or Complete it) even if the task is not assigned to them.

4.4 Add Task

When you click the **Add Task** button in the Task List screen, the *Task Detail: Overview* tab opens, as shown below.

Use this screen to add a task to the task list.



See also these other Task Detail tabs:

- Task Checklist tab — Create a checklist to record progress on the task.
- Task Actions tab — add a defined action to the task.
- Task Notifications — Add custom notifications for task events.

Use these fields in the Overview tab to define task properties:

- **Task Name** — Enter the name of the task
- **Due Date** — Enter a due date for the task.
- **Status Date** — This field shows the date of the last update
- **Phase** — Select the phase of the task.
- **Milestone** — Check this box if the task is a milestone and should be displayed on the graph and in reports.
- **Task List Options** — Select one or more of these options for handling due dates:
  - *Expire on due date* — Make task expire automatically if it is not completed by the due date.
  - *Update dependent (subsequent) due dates* — If this task's due date changes, adjust the due dates of tasks that are dependent on it (subsequent tasks).
  - *Update dependent-on (previous) due dates* — If this task's due date changes, adjust the due dates of tasks that it is dependent on (previous tasks).
- **Phase Gate** — Check this box if the task is a phase gate (that is, the task that completes the selected phase and kicks off the next phase).
- **Task Types** — Click to open the drop-down menu and assign one or more task types. The following task types are available:
  - *Agency* — Designates OEP actions. Note: For *Agency* tasks, users with the Agency Admin or eRA FOAM Admin user role can act on the task (Start it, set it to Not Started, Delete it or Complete it) even if the task is not assigned to them. And IC users cannot access these tasks at all.
  - *Optional* — Tasks that may not need to be executed for the FOA and can be filtered out from a Task List view. Note: Once an optional task is initiated, it is no longer considered optional.
  - *Shared Interest* — When a Shared Interest task is initiated, the Shared Interest tab becomes available for other organizations to add their participation.

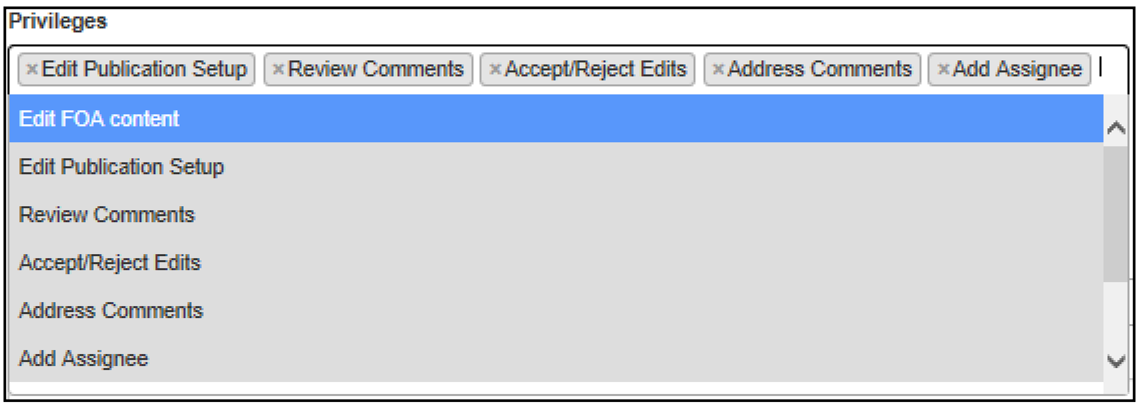
- **Privileges** — Use this field to give the assignee privileges for making changes to the task. click to see instructions:

Click the **Privileges** field to open drop-down menu and select one or more privileges:

Click privileges one-by-one to select them and add them to the list, as shown below. You can add as many as you want.

Click on a privilege a second time to remove it from the list.

NOTE: See the list of privileges that are available for your user role.



- **Task Completion Requirements** — Completion requirements can be set on a task to prevent the task from being completed if the requirements have not been met. The following completion requirements can be set based on the task privileges selected:

- Validate NIH Guide Attributes: ensure that key attributes needed for Guide review have been entered. Available with Edit Key Attributes privilege. Different attributes are validated depending on the FOA type:
    - For RFA/PAS: Issuing Component, Activity Code, Purpose, Standard Due Dates Apply, New/Reissue, Clinical Trial Related, Concept Clearance fields, Diversity, Standard Review Criteria, SBIR Direct Phase II, First Application Due Date, Publication Date
    - For PA/PAR as well as RFA/PAS if not an NIH Organization: Issuing Component, Activity Code, Purpose, Standard Due Dates Apply, New/Reissue, Clinical Trial Related, Diversity, Standard Review Criteria, SBIR Direct Phase II, First Application Due Date, Publication Date

Task Completion Requirements

  - For Notices: Issuing Component, Purpose, New/Reissue, Publication Date
  - For all FOA types: Validate that one and only one attachment of type Full Announcement is present if no document template is associated with the FOA.
  - For OpDivs (non-NIH organizations): Concept Clearance fields are not required.
  - If an exception is requested: justification text area has to be filled in.
  - For Limited Competition Exception: at least one Limited Competition Category has to be selected.
- Validate FOA Content: ensure that all required data element on the FOA content have been entered. Available with Edit FOA Content privilege.
- Shared Interest Period: ensure that 14 days have passed after the task was set to In Progress or 5 if the FOA Classification allowing for a reduced holding period field is checked. Available with Edit FOA Content privilege. Not enforced if FOA type is one of the notice types (not RFA/PA/PAS/PAR).
- Validate Grants.gov Synopsis: validate that the synopsis fields are filled in. Available with Edit Publication Setup privilege.
- Validate Grants.gov Application Package(s): validate that the application packages are there. Available with Edit Publication Setup privilege.
- -Validate Published Forecast: validate that the forecast has been published. Available with Publish Forecast Record privilege.
- Validate Published Opportunity: validate that the full opportunity has been published. Full Opportunity has 3 components: Synopsis, Package and Related Document or Related Documents link. Available with Publish Opportunity privilege.
- Validate GMM Record: validate that the GMM fields are filled in, Available with Edit Publication Setup privilege.
- Validate GMM Publication: validate that the FOA has been published to GMM. Available with Publish to GMM privilege.
- Validate Current Template: validate that the FOA is using an active template and it's publishing rules correspond to the key attributes for the FOA. Available with Edit Key Attributes privilege.
- Validate OTA Attributes: validate that the FOA can be send to the eRA review web service. Available with Edit Key Attributes privilege.
  - Given Review Bypass is not checked, Council Round, Total Criteria Max Score, and at least one Criteria with Criterion Label and Score have to be defined.
  - Given Receipt and Referral Bypass is checked and Review Bypass is not checked,

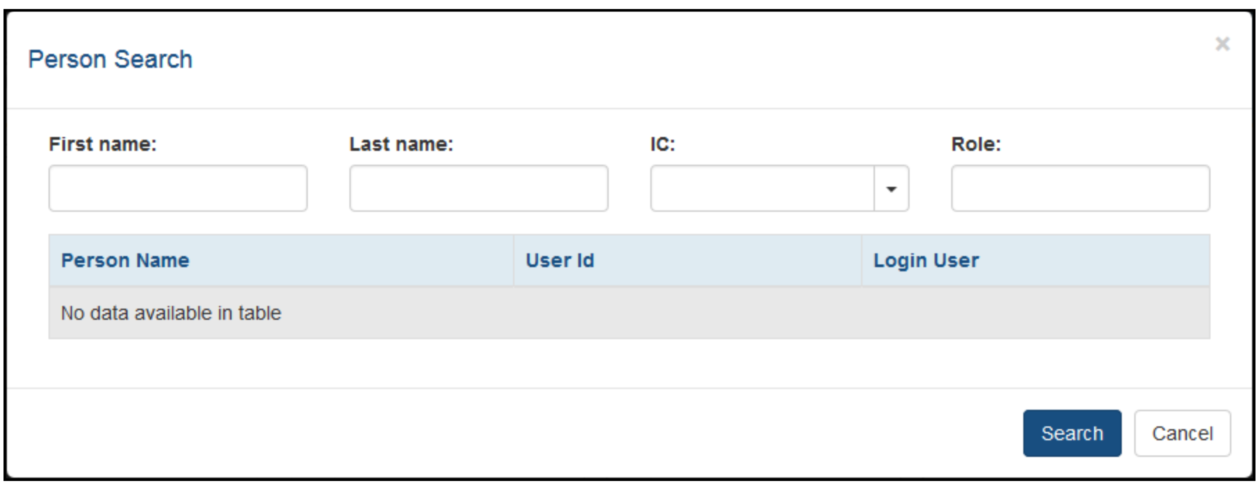
Task Completion Requirements

IRG/SRG-Flex have to be defined. If Receipt and Referral Bypass is not checked IRG/SRG-Flex and SRO Designator-Flex can be entered in eRR and are therefore not required to be entered in FOAM.

- Given Receipt and Referral Bypass is not checked, First Application Due Date is mandatory since RR needs this date.
- Publication Date, Expiration Date, and Activity Code have to be filled in.
- The sum of all review criteria max scores must equal to the value in the Total Criteria Max Score.

Task Completion Requirements

- **Assigned To**: Who is responsible for completing this task? Use the next two fields to specify: You can assign the task to a specific person and/or to any user who has a given user role.
    - *Assigned to Role* — Select FOA or eRA roles responsible for completing the task.
    - *Assigned to Person* — Select user(s) responsible for completing the task: Click the magnifying glass icon to open a pop-up Person Search window, as shown below. Perform your search and select a person to close the pop-up window.



- **Dependent On** — Use to create task dependencies: Click to open a drop-down menu and select the tasks that must be completed before this task can be started.
  Note: If you make your task dependent on an optional task, the assignee does not have to wait for the optional task to be completed: He or she can start anytime as long as all non-optional tasks have been completed.

- **Start task on completion of dependencies** — check to start the task automatically once all tasks it depends on are completed.
- **Category** — the category of the task used for reporting.
- **Task Description** — Description of the task. This can be used to provide instructions to the assignee of what needs to be done for this task.

Saving the Task

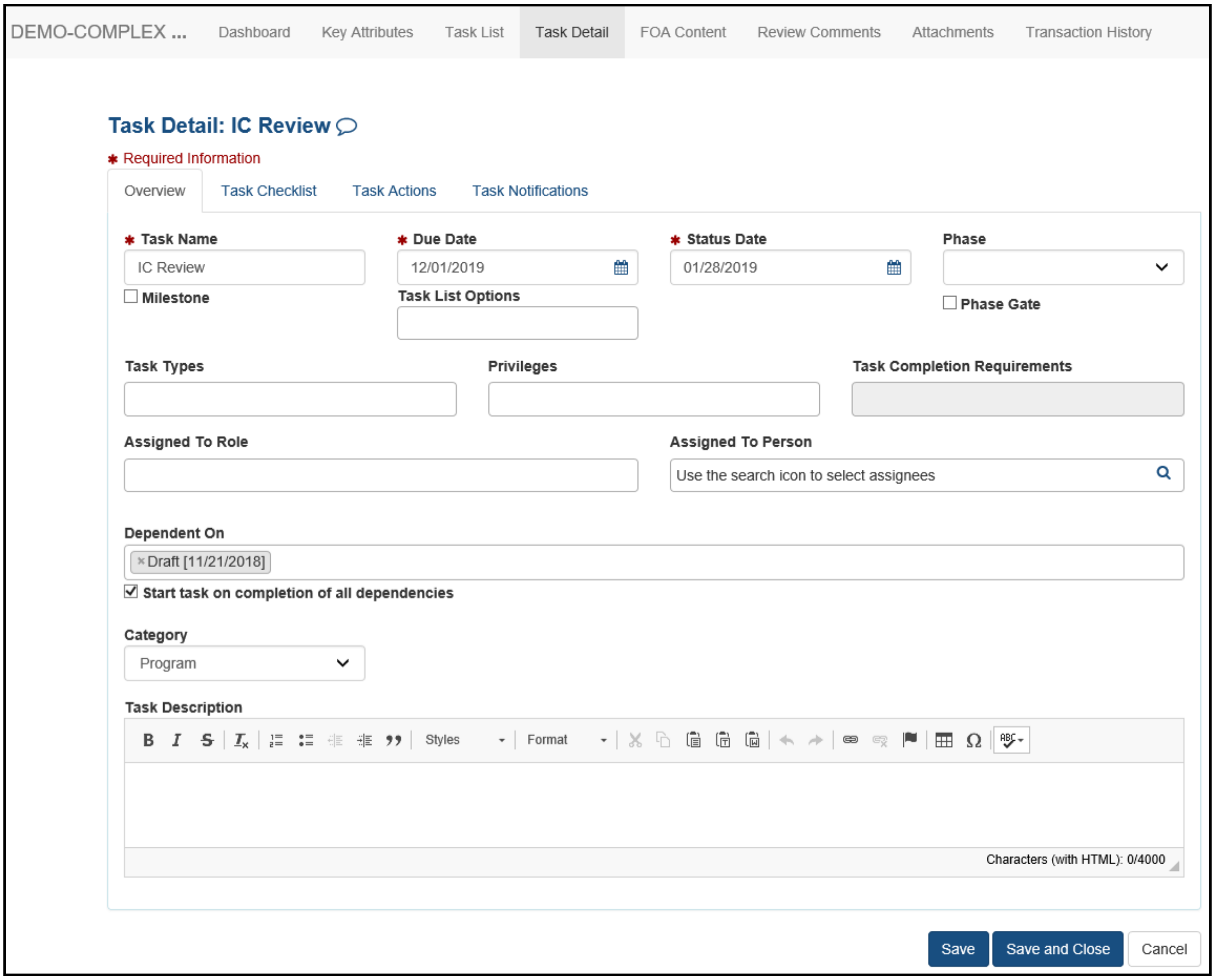
At any point in this process, you can click the **Save** button to save your changes.

When you are finished configuring the task, click **Save and Close** to save your changes and close the window.

4.5 Task Detail

All users can access this screen to view detailed information about tasks.

Admin users can also use this screen to add or edit tasks: When you click a task name or the click the **Add Task** button in the Task List screen, the Task Detail Overview tab opens, as shown here:



See also these other Task Detail tabs:

- Task Checklist tab — Create a checklist to record progress on the task.
- Task Actions tab — add a defined action to the task.
- Task Notifications — Add custom notifications for task events.

Use these fields in the Overview tab to define task properties:

- **Task Name** — Enter the name of the task
- **Due Date** — Enter a due date for the task.
- **Status Date** — This field shows the date of the last update
- **Phase** — Select the phase of the task.
- **Milestone** — Check this box if the task is a milestone and should be displayed on the graph and in reports.

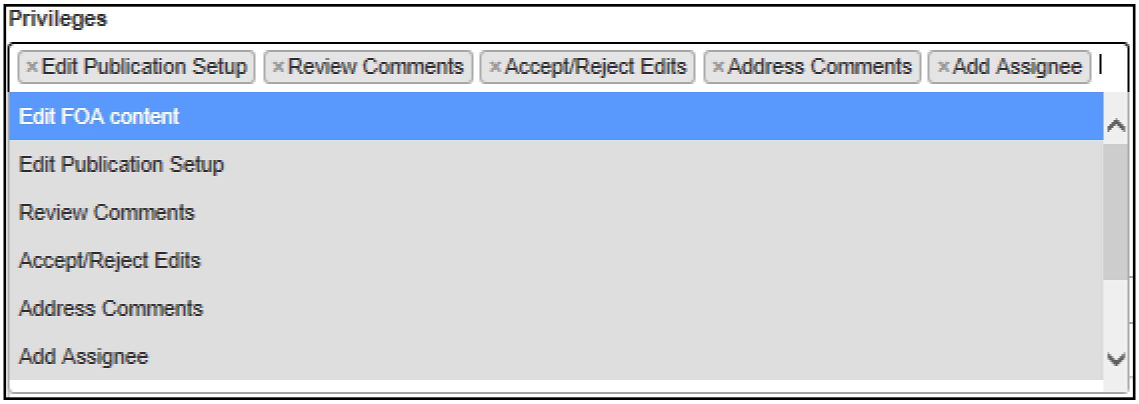
- **Task List Options** — Select one or more of these options for handling due dates:
    - *Expire on due date* — Make task expire automatically if it is not completed by the due date.
    - *Update dependent (subsequent) due dates* — If this task's due date changes, adjust the due dates of tasks that are dependent on it (subsequent tasks).
    - *Update dependent-on (previous) due dates* — If this task's due date changes, adjust the due dates of tasks that it is dependent on (previous tasks).
- **Phase Gate** — Check this box if the task is a phase gate (that is, the task that completes the selected phase and kicks off the next phase).
- **Task Types** — Click to open the drop-down menu and assign one or more task types. The following task types are available:
    - *Agency* — Designates OEP actions. Note: For *Agency* tasks, users with the Agency Admin or eRA FOAM Admin user role can act on the task (Start it, set it to Not Started, Delete it or Complete it) even if the task is not assigned to them. And IC users cannot access these tasks at all.
    - *Optional* — Tasks that may not need to be executed for the FOA and can be filtered out from a Task List view. Note: Once an optional task is initiated, it is no longer considered optional.
    - *Shared Interest* — When a Shared Interest task is initiated, the Shared Interest tab becomes available for other organizations to add their participation.
- **Privileges** — Use this field to give the assignee privileges for making changes to the task. click to see instructions:

Click the **Privileges** field to open drop-down menu and select one or more privileges:

Click privileges one-by-one to select them and add them to the list, as shown below. You can add as many as you want.

Click on a privilege a second time to remove it from the list.

NOTE: See the list of privileges that are available for your user role.



- **Task Completion Requirements** — Completion requirements can be set on a task to prevent the task from being completed if the requirements have not been met. The following completion requirements can be set based on the task privileges selected:

- Validate NIH Guide Attributes: ensure that key attributes needed for Guide review have been entered. Available with Edit Key Attributes privilege. Different attributes are validated depending on the FOA type:
  - For RFA/PAS: Issuing Component, Activity Code, Purpose, Standard Due Dates Apply, New/Reissue, Clinical Trial Related, Concept Clearance fields, Diversity, Standard Review Criteria, SBIR Direct Phase II, First Application Due Date, Publication Date
  - For PA/PAR as well as RFA/PAS if not an NIH Organization: Issuing Component, Activity Code, Purpose, Standard Due Dates Apply, New/Reissue, Clinical Trial Related, Diversity, Standard Review Criteria, SBIR Direct Phase II, First Application Due Date, Publication Date
  - For Notices: Issuing Component, Purpose, New/Reissue, Publication Date
  - For all FOA types: Validate that one and only one attachment of type Full Announcement is present if no document template is associated with the FOA.
  - For OpDivs (non-NIH organizations): Concept Clearance fields are not required.
  - If an exception is requested: justification text area has to be filled in.
  - For Limited Competition Exception: at least one Limited Competition Category has to be selected.
- Validate FOA Content: ensure that all required data element on the FOA content have been entered. Available with Edit FOA Content privilege.
- Shared Interest Period: ensure that 14 days have passed after the task was set to In Progress or 5 if the FOA Classification allowing for a reduced holding period field is checked.

Task Completion Requirements

Available with Edit FOA Content privilege. Not enforced if FOA type is one of the notice types (not RFA/PA/PAS/PAR).

- Validate Grants.gov Synopsis: validate that the synopsis fields are filled in. Available with Edit Publication Setup privilege.
- Validate Grants.gov Application Package(s): validate that the application packages are there. Available with Edit Publication Setup privilege.
- -Validate Published Forecast: validate that the forecast has been published. Available with Publish Forecast Record privilege.
- Validate Published Opportunity: validate that the full opportunity has been published. Full Opportunity has 3 components: Synopsis, Package and Related Document or Related Documents link. Available with Publish Opportunity privilege.
- Validate GMM Record: validate that the GMM fields are filled in, Available with Edit Publication Setup privilege.
- Validate GMM Publication: validate that the FOA has been published to GMM. Available with Publish to GMM privilege.
- Validate Current Template: validate that the FOA is using an active template and it's publishing rules correspond to the key attributes for the FOA. Available with Edit Key Attributes privilege.
- Validate OTA Attributes: validate that the FOA can be send to the eRA review web service. Available with Edit Key Attributes privilege.
    - Given Review Bypass is not checked, Council Round, Total Criteria Max Score, and at least one Criteria with Criterion Label and Score have to be defined.
    - Given Receipt and Referral Bypass is checked and Review Bypass is not checked, IRG/SRG-Flex have to be defined. If Receipt and Referral Bypass is not checked IRG/SRG-Flex and SRO Designator-Flex can be entered in eRR and are therefore not required to be entered in FOAM.
    - Given Receipt and Referral Bypass is not checked, First Application Due Date is mandatory since RR needs this date.
    - Publication Date, Expiration Date, and Activity Code have to be filled in.
    - The sum of all review criteria max scores must equal to the value in the Total Criteria Max Score.

Task Completion Requirements

- **Assigned To**: Who is responsible for completing this task? Use the next two fields to specify: You can assign the task to a specific person and/or to any user who has a given user role.
    - *Assigned to Role* — Select FOA or eRA roles responsible for completing the task.
    - *Assigned to Person* — Select user(s) responsible for completing the task: Click the magnifying glass icon to open a pop-up Person Search window, as shown below. Perform your search and select a person to close the pop-up window.

- **Dependent On** — Use to create task dependencies: Click to open a drop-down menu and select the tasks that must be completed before this task can be started.
  Note: If you make your task dependent on an optional task, the assignee does not have to wait for the optional task to be completed: He or she can start anytime as long as all non-optional tasks have been completed.
- **Start task on completion of dependencies** — check to start the task automatically once all tasks it depends on are completed.
- **Category** — the category of the task used for reporting.
- **Task Description** — Description of the task. This can be used to provide instructions to the assignee of what needs to be done for this task.

Saving the Task

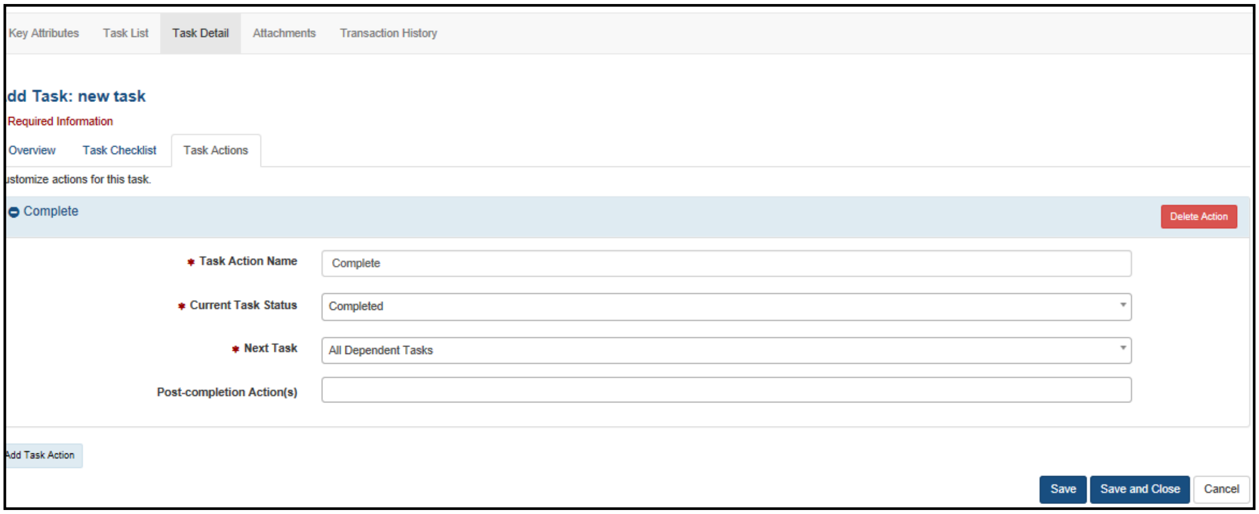
At any point in this process, you can click the **Save** button to save your changes.

When you are finished configuring the task, click **Save and Close** to save your changes and close the window.

4.6 Task Detail: Task Actions tab

This screen opens when you click the Task Detail screen's *Task Actions* tab.

Use it to add a defined action to the present task.



See also these other Task Detail tabs:

- Overview tab
- Task Checklist tab

1. To add a task action to the task, complete these four fields:

a. **Task Action Name**

b. **Current Task Status** — Select Completed, Expired, Not Started, On Hold, or Bypassed.

c. **Next Task** — If you wish, you can override the task order defined by the task list and select a different future task to be the next required task after this task is completed. See Next Task Configuration below for instructions.

d. **Post-completion Action(s)** — Select system actions to be performed immediately after the task is completed. You can select the following actions:

   - **Approve/Disapprove Limited Competition Exception** – Approval puts the digital signature of the OEP Director under the Limited Competition exception, and allows the PDF of the exception memo to be generated. (see Exception Requests tab)

- **Approve/Disapprove Page Limit Exception** – Approval puts the digital signature of the OEP Director under the Page Limit exception, and allows the PDF of the exception memo to be generated. (see Exception Requests tab)
- **IC Limited Competition Approval** – Puts the digital signature of the IC Approving Official under the Limited Competition exception. (see Exception Requests tab)
- **IC Page Limit Exception Approval** – Puts the digital signature of the IC Approving Official under the Page Limit exception. (see Exception Requests tab)
- **Lock/Unlock FOA Content** – Prevent or enable editing of FOA elements.
- **Notify of Task Completion** – Send email notification to the Guide Liaison and Guide Director that the task has been completed.
- **Propagate Dependent Due Dates** – Reset dependent task due dates to maintain the configured number of workdays between task due dates.
- **Shared Interest Period completion** — Require *Shared Interest* tasks to be in progress for at least 14 days before they can be completed. (**Note**: NIH only. And does not apply to *Notice* or *Supplement* FOA types: Shared interest tasks on these FOAs can be completed right away.)

Plus these actions for Agency Admins and eRA FOAM Admins only:

- **Set PA FON** — Manually set the FON for *PA* FOAs
- **Set RFA FON** — Manually set the FON for *RFA* FOAs
- **Set Notice FON** — Manually set the FON for *Notice* FOAs.

Note: Only one Page Limit-related post-completion action and one Limited Competition post-completion action can be selected for a task.

Next Task configuration:

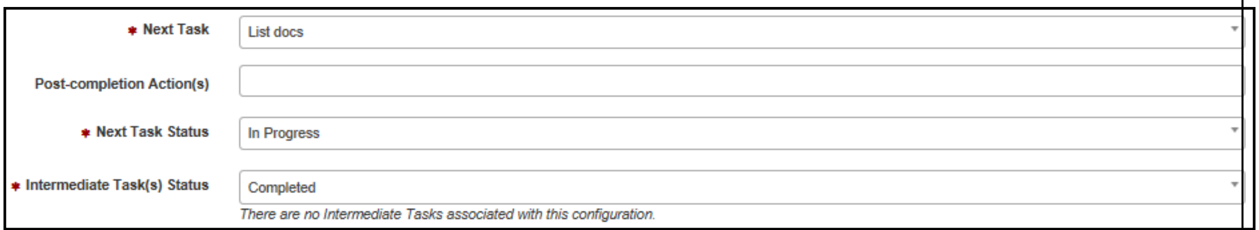
If you wish, you can use the **Next Task** field shown above to override the task order defined by the task list and to select a different future task to be the next required task after the present task is completed.

When you select a **Next Task** in this field, two additional fields are added to the bottom of the grid, as shown below.

Complete these two fields to configure the next-task requirement:

- **Next Task Status** — Set the status of the selected Next Task: Select Completed, Expired, Not Started, On Hold, or Bypassed

- **Intermediate Task(s) Status** — And also choose a status to apply to any tasks that come between the present task and the selected Next Task in the original task list order.

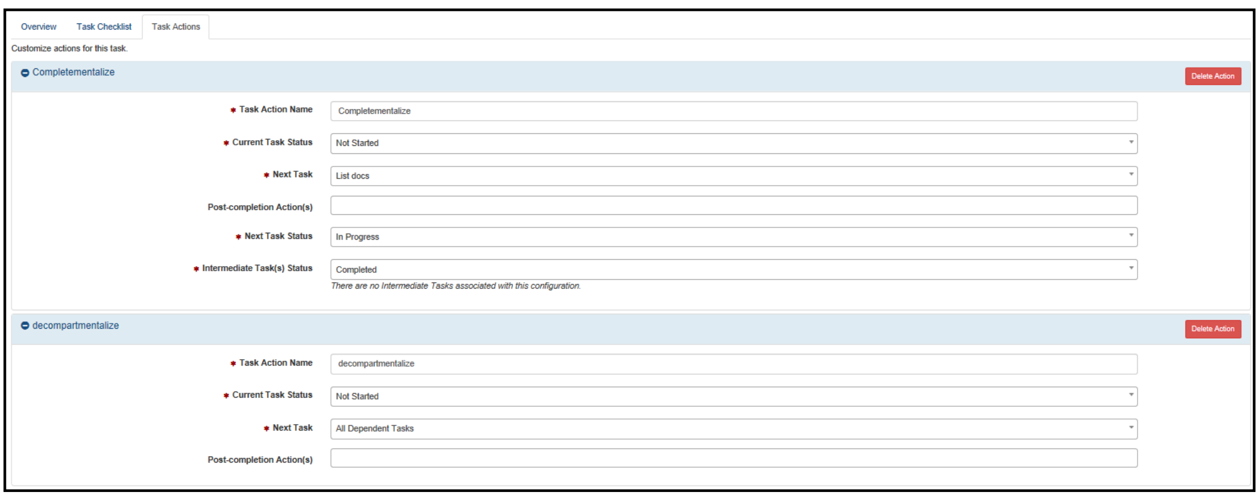


2. To add another task action to the task, click the **Add Task Action** button: Another set of configuration fields will appear in the screen. Configure them as described above.

3. When you're finished adding task actions, click **Save** to save your changes or click **Save and Close** to save the actions and close the window, or click Cancel to cancel, or click **Delete Action** as needed to delete unwanted actions.

When you save a new action, it appears as the last task in the Task Actions tab, as shown below:

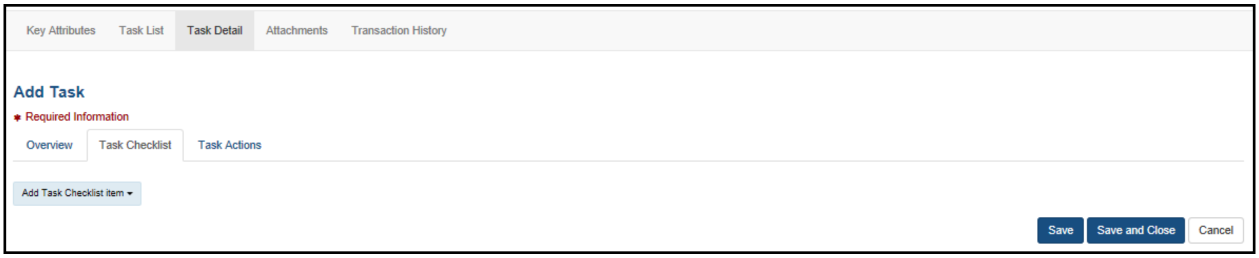
You can edit it as described above or click Delete Action to delete it.



4.7 Task Detail: Task Checklist tab

When you click *Task Checklist* in the *Task Detail* screen, the *Task Detail: Task Checklist* tab opens, as shown here:

Use this screen to create a checklist for the task, and add checklist items to record progress on the steps that are necessary to complete the task.



See also these other Task Detail tabs:

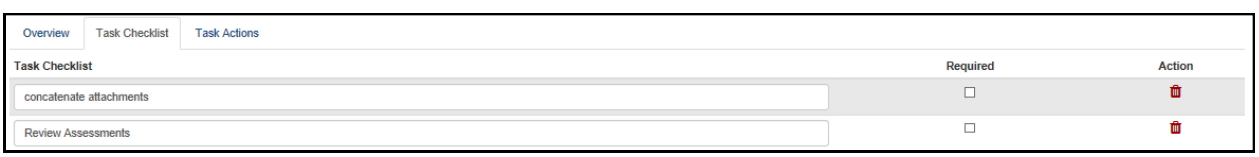
- Overview tab
- Task Actions tab

The Task Checklist tab contains this control:

Enter New Task Checklist — You can add checklist items to record progress on the steps that are necessary to complete the task. Follow these steps:

1. Click **Add Task Checklist item** to open the task editing tool, as shown here:

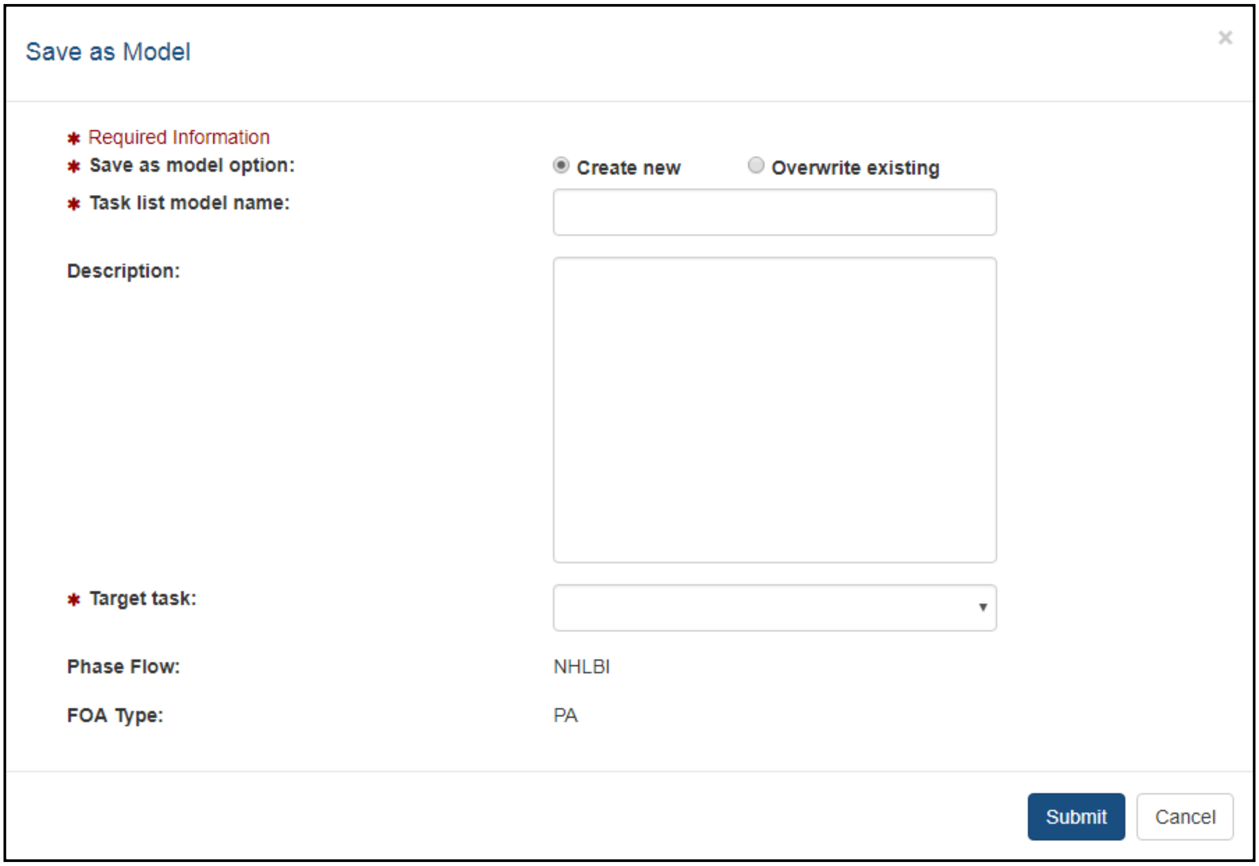
2. Type the task item in the text field and click the check button to save it.
3. Saved checklist items appear in the Task Checklist display, as shown here:



4. Click the **Required** box to make an item mandatory, leave blank for optional items.
   Click the trash icon to delete an item.
5. Click **Save** to save your changes or click **Save and Close** to save the checklist and close the window.

4.8 Save as Model

This screen opens when you select the **Save as model** action in the Task List screen. Use it to save a task list as a model that your IC can use as the basis for future task lists.



1. To save the model, enter information as described in the table below, then click **Submit**.
2. FOAM returns you to the Task List screen.

Save as Model screen

Field	Description
Create New, Overwrite existing	Choose to create a new model or overwrite an existing model.
Task List Model Name	• If you're creating a new model, enter a unique name. • If you're rewriting an existing model, select the model from the list.

Save as Model screen

Field	Description
Description	Enter a description of the model.
Target Task	Select a task to use as the benchmark to calculate the due dates for all the other tasks in the list. See the business rules below for more information on these due dates. Note: if you're overwriting an existing model, that model's target task is selected by default.
Phase Flow	Read only: This field lists the phase flow of the original FOA that will also be associated with the new task list model.
FOA Type	Read only: This field lists the original FOA Type that will also be associated with the new task list model.

The next time you create a new task list for a FOA, you will have the option of basing it on the model you created.

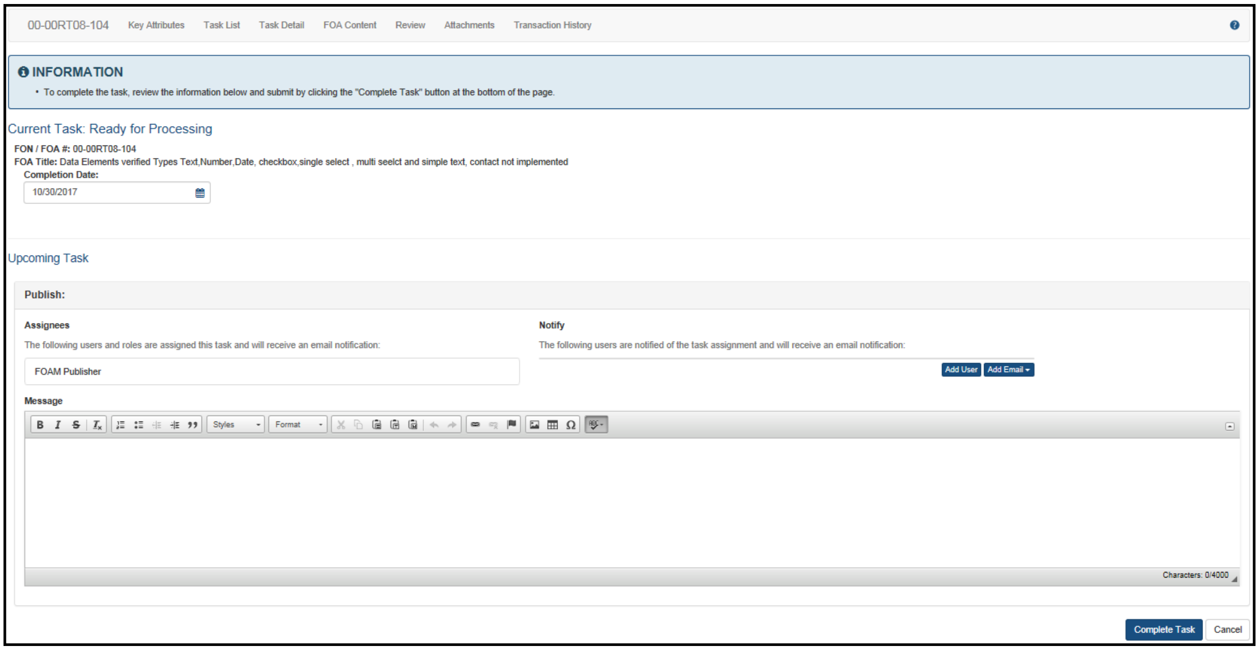
Business rules for task list creation from a model:

- Each task in the new task list contains the same properties as the corresponding task in the model list: name, assignments, milestone indicator, dependencies, phase, and phase gate indicator. (See Task Detail for more information on these task properties.
- The due date for each task is calculated in reference to the task you select in the Target Task field:
    - FOAM notes the time difference between the due date of the task in the model list and the due date of the model's target task;
    - then it takes this time difference and adds or subtracts it to the due date of the Target task you select in this screen:
    - If a task in the model list was due two days after that list's target task, it will also be due two days after the target task in the new task list.

See Create Task List for more information on creating a new task list based on a model.

4.9 Task Completion

When you click the *Complete* action for a task in My Inbox, or a task list, the Task Completion screen opens, as shown here:



Use this screen to complete any remaining elements of the task, and send notifications to the users responsible for the next task(s):

Task Checklist

The task checklist lists items that should be completed as part of the task. Any items marked by a red asterisk must be checked off before the task can be completed

Upcoming Tasks

This section lists all dependent tasks: After you complete this task, the dependent tasks can also be completed.

4.9.0.1 Message

To send a custom message, enter it in the **Message** field.

The message will go to all listed task assignees.

To add additional recipient(s) click **Add Email** and enter an email address or click **Add User** and search for the user in the *Person Search screen, shown here*.

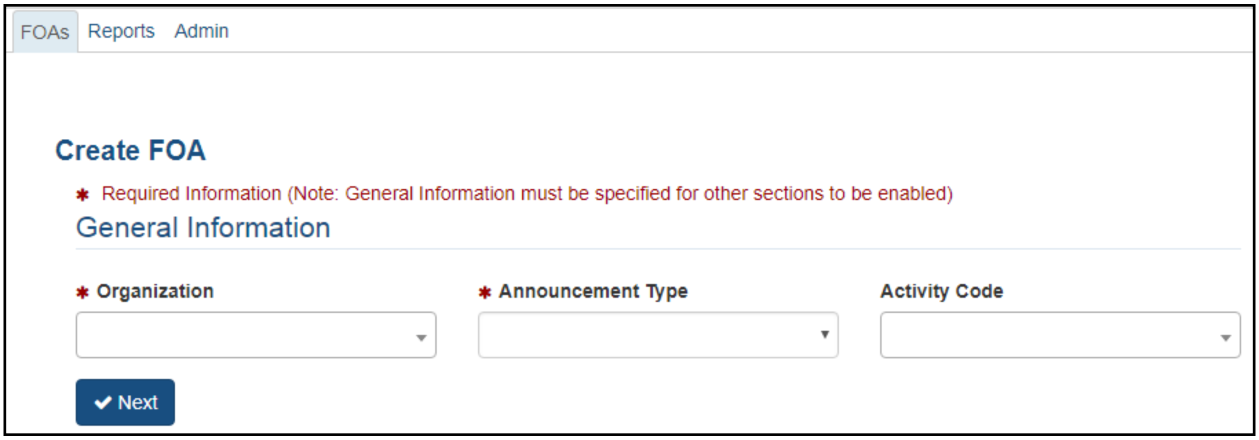
When you finish these steps, then click **Complete Task** to mark the task compete and send the notifications.

Note: When you add a message on completion of a dependent task, it is added as a comment on the dependent task. If there is no dependency, it is added as a comment on the task being completed.

4 Create FOA

This screen opens when you click the **Create FOA** button on the FOA List screen.

Follow the instructions below to create a new FOA.

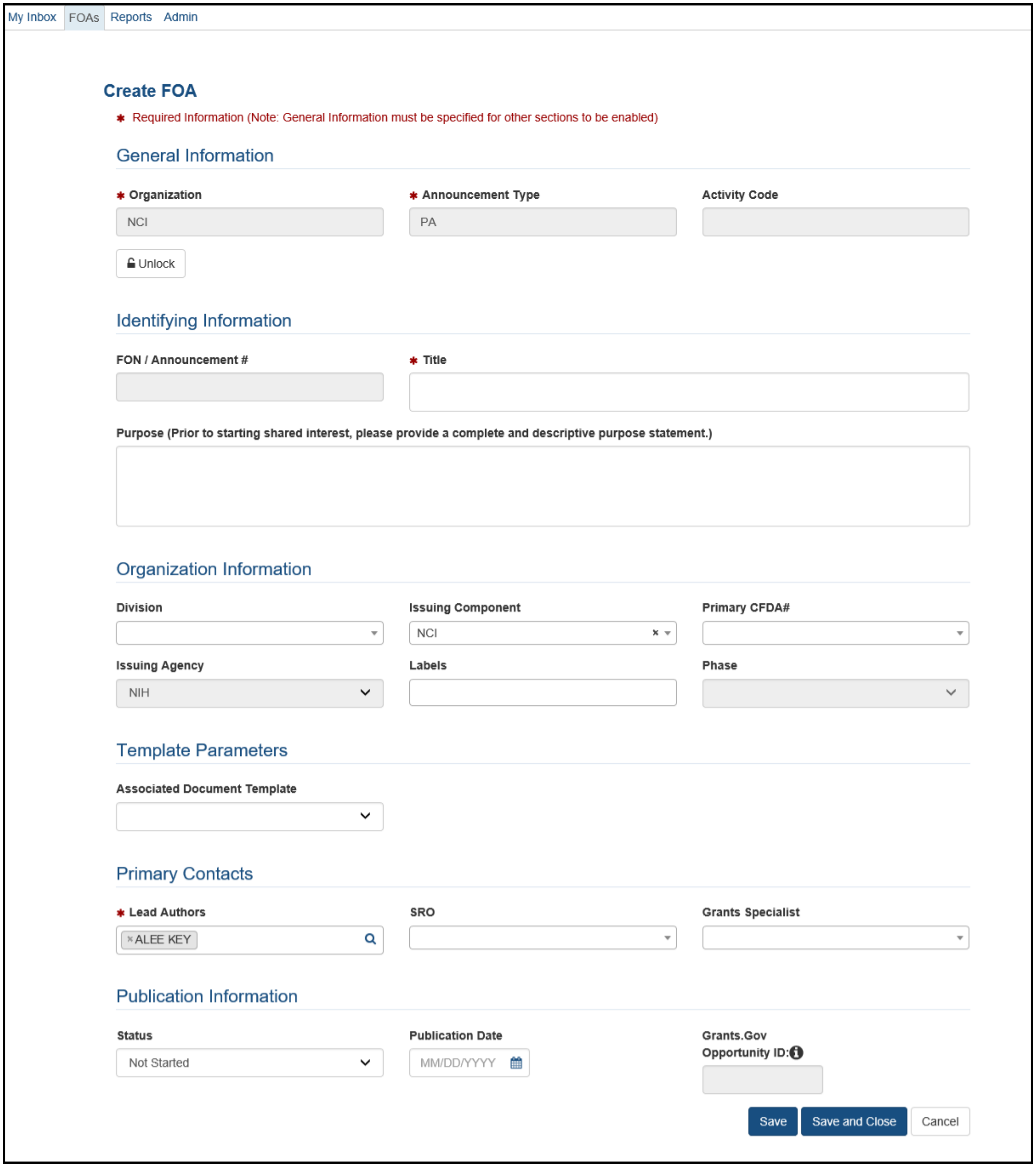


1. To configure the FOA, you must first populate the fields in the *General Information* area: *Organization* and *FOA Type*, and, if you wish, *Activity Code*,and then click the **Next** button to lock your selections.

2. Only after these fields are set and locked will all of the other fields and the complete range of configuration options be displayed, as shown below:

   Also note that once the General Information fields are locked, the **Next** button is replaced by an **Unlock** button. Click this if you need to change the General Information fields, and then lock them again to load the rest of the configuration fields.

(missing or bad snippet)



3. When the fully populated screen displays, set these other attributes to configure the FOA:

Field	Description
FON/FOA #	Enter a unique identifier for this FOA. **Note**: If you don't enter a value, FOAM will generate a FON. **Note**: For FOA type OTA, users cannot manually enter the FON: You must use the system-generated FON.
Announcement Type	Select the type of announcement. Note: *Notice of Intent to Publish* is listed as a FOA Type in this menu, but you can't select this value: To create a Notice of Intent to Publish you must first create the FOA the NOITP will refer to, then open it and click the **Create NOITP** button. See Key Attributes tab: Overview for more information.)
Activity Code	If you already know the activity code for the FOA, you can select it now.
Title	Enter the title of this FOA (Up to 255 characters). **Note:** The FOA Title is visible on all FOA tabs when you hover the mouse over the announcement number.
Purpose	Provide a complete and descriptive purpose statement.
Organization	Select the organization that is issuing this FOA. **Note**: If you have FOA authoring permissions at more than one organization, use the drop-down menu to select the primary issuing organization.
Division	Select the division within the issuing organization, if applicable.
Issuing Component	The office or other component within the issuing organization, if applicable
Primary CFDA #	After you select an Issuing Component, this field is populated with the available CFDA (Primary Catalog of Federal Domestic Assistance) numbers for the Issuing Component. Select a number from the drop-down menu.
Labels	Select labels to apply to this FOA.
Phase	Select the phase for this FOA, if applicable.
Issuing Agency	Select the issuing agency.
Associated Document	Select the template to use for the content editing of the FOA.

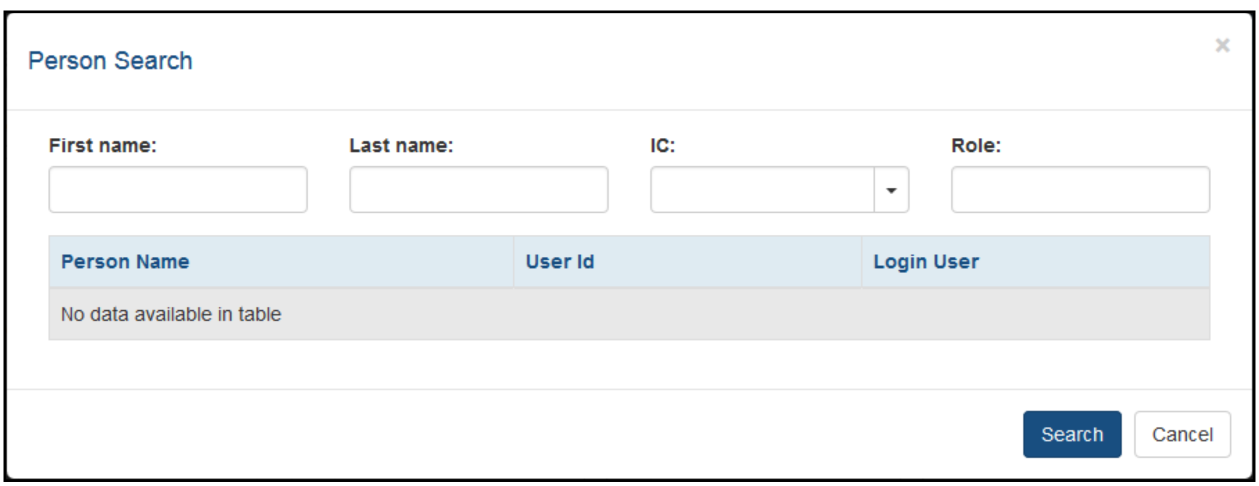
Key Attributes

Field	Description
Template	
SRO	Select the Scientific Review Official for this FOA: Begin typing the name and FOAM will attempt to match it to users who have the SRO role — when the correct name appears, click to select it.
Grants Specialist	Select the Grants Specialist for this FOA: Begin typing the name and FOAM will attempt to match it to users who have the GMS or GMO role — when the correct name appears, click to select it.
Status	Current status of the FOA: Not Started, In Progress, Published, Archived, On Hold, or Cancelled. Note: The Status automatically changes to "In Progress" when the first FOA task is started. Note: Notice of Intent to Publish FOAs are marked as cancelled if associated FOA is not published within 12 months.
Publication Date	For NIH FOAs, select the date of publication in the NIH Guide.

Key Attributes

4. When you finish entering data in this screen, click **Save** to create the FOA.

Person Search window:



5 FOAs

The*FOAs* screen opens when you click the FOA tab, as shown below.

Use this screen to access existing FOAs and create new ones for your IC.

5.1 Selections and Filters

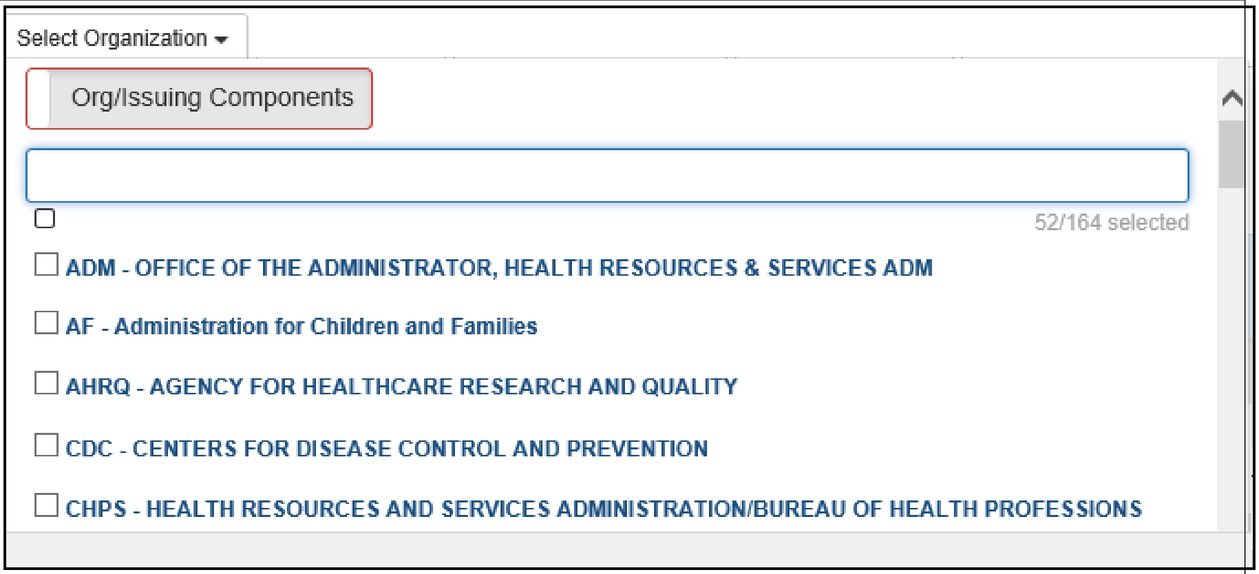
The selections and filters along the top allow you manage which announcements are displayed in the list by expanding or narrowing down the selection of announcements. There are two types of drop-downs:

- Use the **Select** drop-down fields to select the FOA *Organization*, current *Status*, and *Announcement Type* you want to display during the current session (you can select multiple properties in each field), then click **Apply Filter** to display only FOAs that match one or more of the selected properties. **Note**: the list of announcements will include only what is selected in the drop-down and will have your current organization, all announcement types, and the status of In Progress selected by default. If nothing is selected in one of these Select drop-downs, no announcements will be displayed.
- Use the **Filter** drop-down fields to limit the display to only the *Agency Task* in progress, *Area of Review* and/or *Label*. By default nothing is selected for these filters and the list of announcements will include all Agency Tasks, Areas of Review and Labels. If one or more items are selected in these filters only matching records active will be displayed.

After you set the Selections and Filters, click the **Apply Filter** button to apply your settings and limit the results appropriately. If necessary, you can click the **Reset Filter** button to clear the filters and selections and return all items to their default values.

After you apply filters, you can use the Filter text box to further limit the results displayed on screen and only show records that include the text string you entered. Note that the Filter text box is not affected by the Apply Filter and Reset Filter buttons, and filtering performed by this text entry does not limit the results in the Excel export.

Note: When you click the **Select Organization** filter, it opens to show an **Org/Issuing Components** toggle, as shown here..

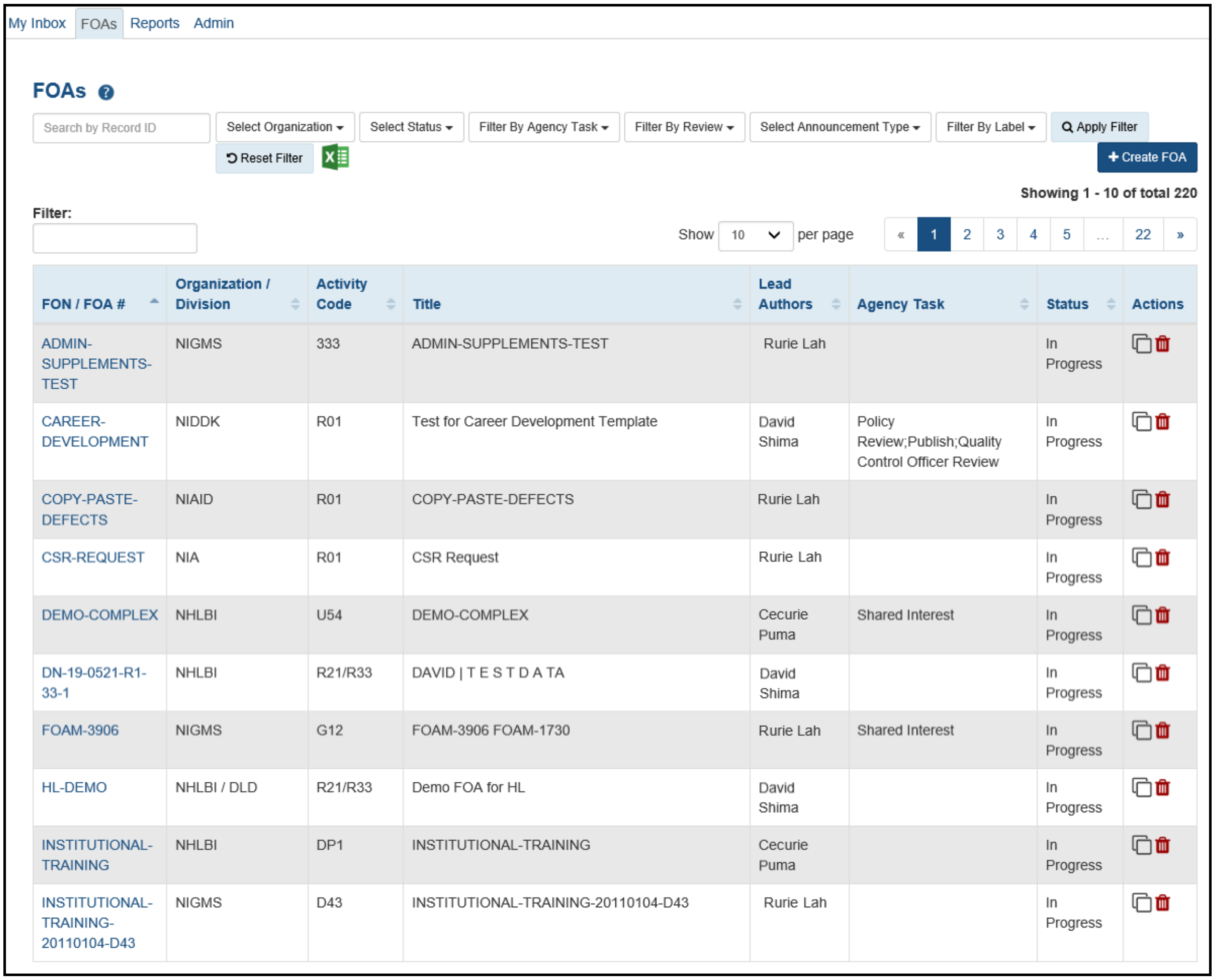


1. Click the  ***Org/Issuing Components*** *toggle* to show only FOAs for which a selected IC is the issuing component.

Or:

2. When you click the **Org/Issuing Components** toggle, it is replaced by a **Participation** toggle, as shown here:  Click the **Participation** toggle to show all FOAs in which the IC participated.

3. Then use the checkboxes to select one or more ICs and click **Apply Filter**.



FON / FOA #	Organization / Division	Activity Code	Title	Lead Authors	Agency Task	Status	Actions
ADMIN-SUPPLEMENTS-TEST	NIGMS	333	ADMIN-SUPPLEMENTS-TEST	Rurie Lah		In Progress	
CAREER-DEVELOPMENT	NIDDK	R01	Test for Career Development Template	David Shima	Policy Review;Publish;Quality Control Officer Review	In Progress	
COPY-PASTE-DEFECTS	NIAID	R01	COPY-PASTE-DEFECTS	Rurie Lah		In Progress	
CSR-REQUEST	NIA	R01	CSR Request	Rurie Lah		In Progress	
DEMO-COMPLEX	NHLBI	U54	DEMO-COMPLEX	Cecurie Puma	Shared Interest	In Progress	
DN-19-0521-R1-33-1	NHLBI	R21/R33	DAVID | T E S T D A TA	David Shima		In Progress	
FOAM-3906	NIGMS	G12	FOAM-3906 FOAM-1730	Rurie Lah	Shared Interest	In Progress	
HL-DEMO	NHLBI / DLD	R21/R33	Demo FOA for HL	David Shima		In Progress	
INSTITUTIONAL-TRAINING	NHLBI	DP1	INSTITUTIONAL-TRAINING	Cecurie Puma		In Progress	
INSTITUTIONAL-TRAINING-20110104-D43	NIGMS	D43	INSTITUTIONAL-TRAINING-20110104-D43	Rurie Lah		In Progress	

5.2 Actions

- Click **Create FOA** to create a new FOA in the Create FOA screen.
- Click the  Excel icon to export the results in Excel format.
- Type a text string in the **Filter** field to show only FOAs that match the text.
- Click **Reset Filter** to clear all filter settings and return them to the defaults.
- Click a *FON/FOA #* in the grid to view and edit the FOA details in the FOA Key Attributes tab.
- Or select one of these actions in the **Actions** column (Note: The choices here depend on your user role and the status of the FOA):

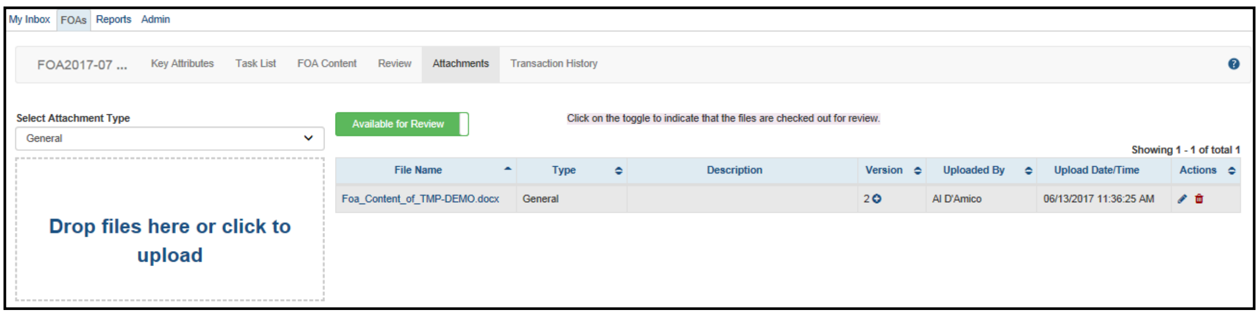
- **Copy FOA** — Click the copy icon to copy the FOA and save the record as a new FOA so you can edit it to suit your needs.
  When you select this action, the system assigns a temporary FOA # and Title and opens the cloned FOA in a new window. Change the FOA # and title if you wish, and edit the other Key Attributes as needed. Note: For the details of the copy operation, see Copy FOA.

- **Delete FOA** — Click the trash icon to permanently delete the FOA.

5.3 Attachments tab

Use to attach documents to the FOA and to manage these attachments.

You can upload multiple versions of a file: FOAM creates a new version of an existing attachment if another file with the same name is uploaded.

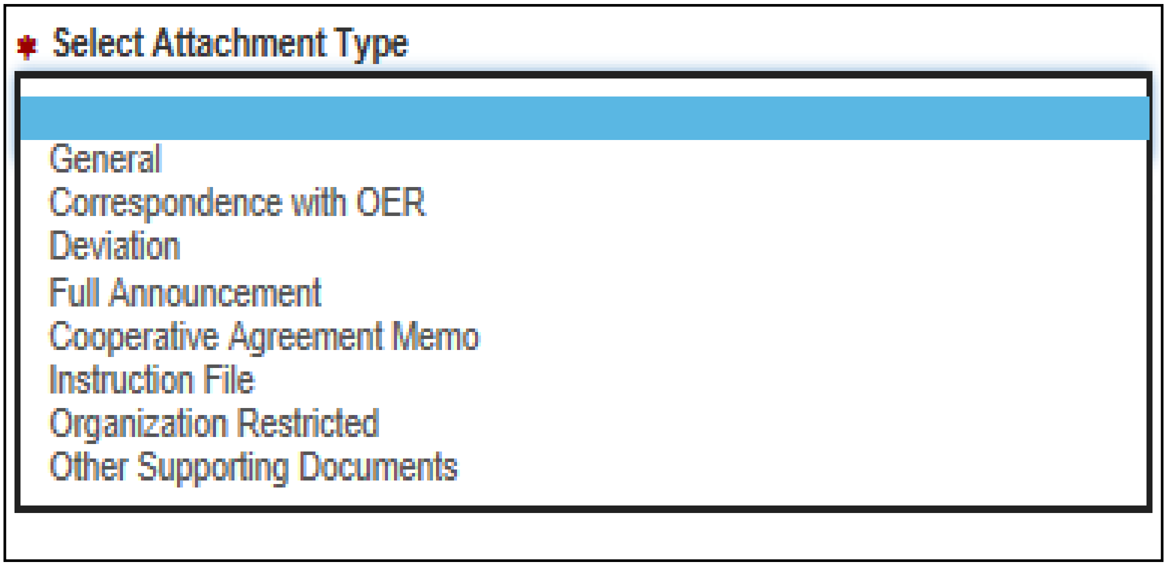


The attachments grid includes these columns:

- **File name** — Name of the attachment
- **Description** — Description of the attachment. To edit, select pencil icon in the Actions column.
- **Version** — Version of the file. If more than one version exists, you can click the + icon next to the version number to see all versions.
- **Uploaded by** — The full name of the user who uploaded the attachment
- **Uploaded date/time** — The date and time the attachment was uploaded
- **Actions**
  * Click the pencil icon to edit the description or the attachment type.
  * Click the trashcan icon to delete the file

Adding an attachment

1. To add an attachment, first select the attachment type:



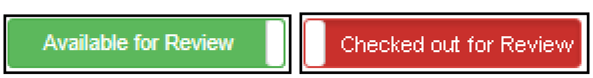
Note: Only FOAM Admins can create 'Organization Restricted' attachments, and such attachments can only be viewed by users from the FOA's organization.

2. Then drop the file onto the *Upload* pane or click the pane and browse to select the file.
3. The file appears in the attachments grid.

Note: For ACF, the following additional file types are available: Deviation(s), Drafter Justification File, Forecast Review File, OAS Approval, Reporting Notes, Review Files, Supporting File, Reviewer Supporting File, Signature

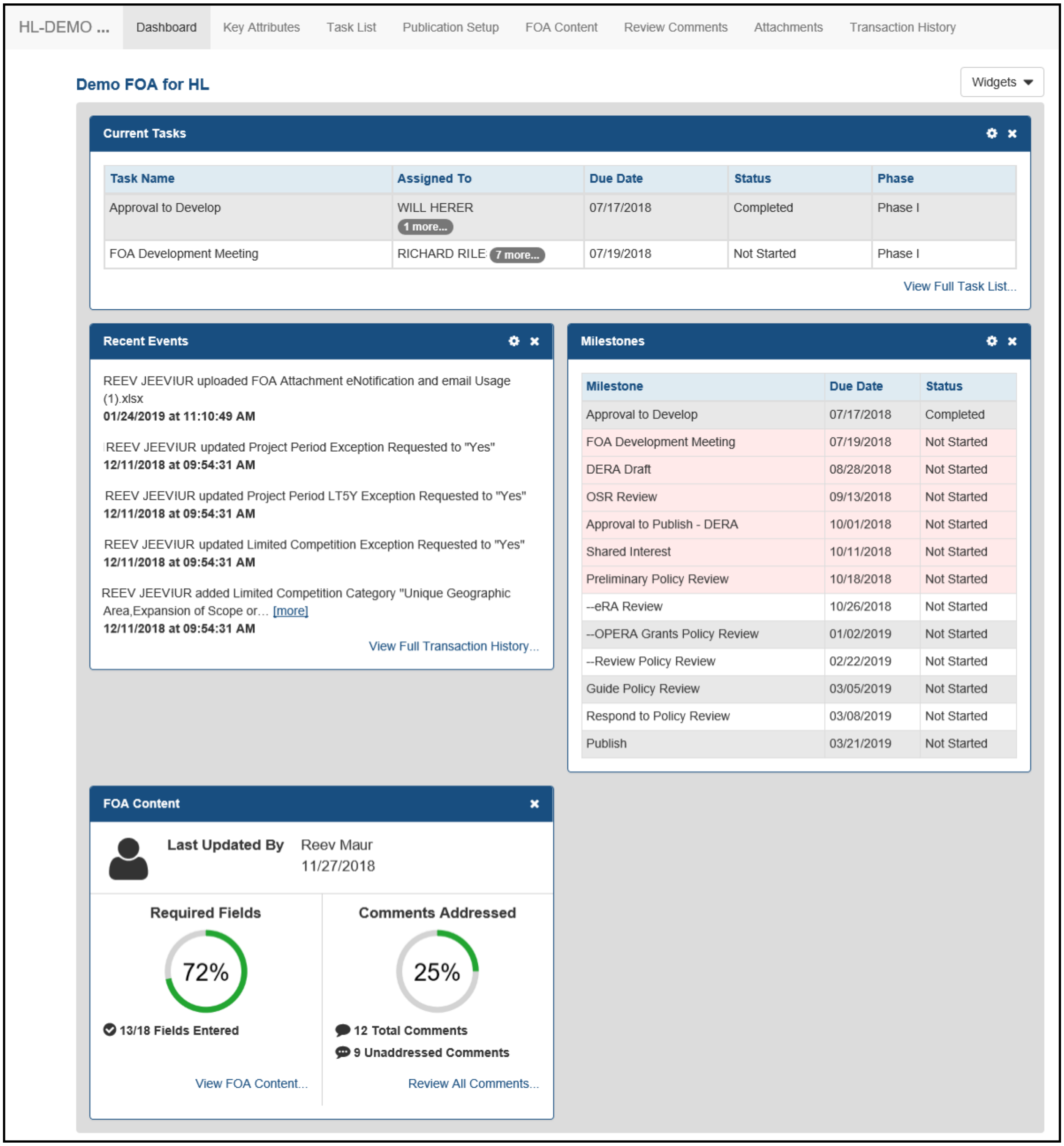
Lock/Unlock

eRA FOAM Admins and Agency users can click the **Available for Review** / **Checked out for Review** buttons to lock or unlock the attached documents for review:



5.4 FOA Dashboard tab

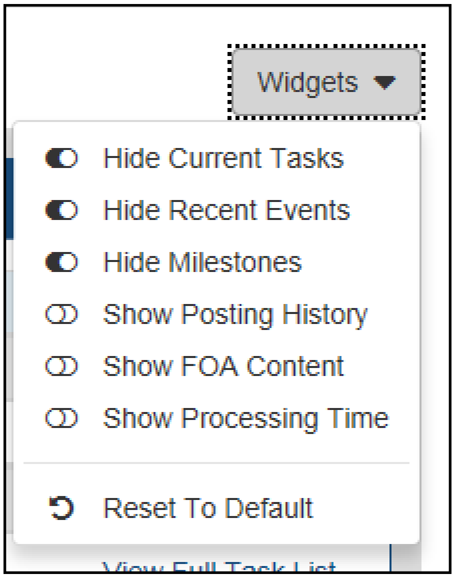
The *Dashboard* tab is the opening screen when you access a FOA.



Widgets:

The dashboard consists of widgets that show you the status of current tasks, coming milestones, recent events and other activity on the FOA.

Click the *Widgets* menu to choose the widgets you want to show in the dashboard, as shown here:



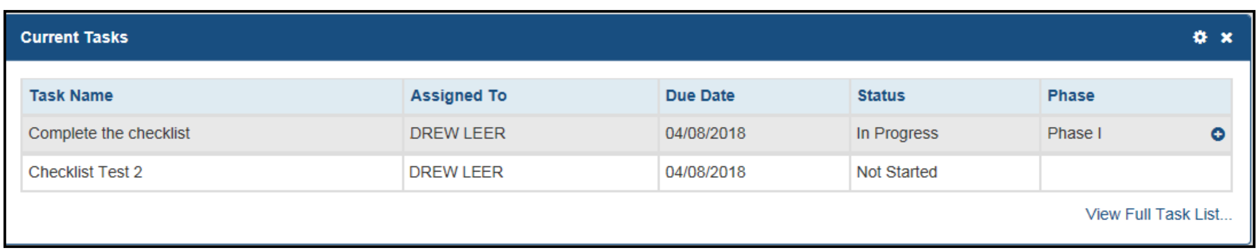
Click the widget name to toggle the Show/Hide setting.

The show/hide preferences you set in this dashboard will be also used when you open other FOAs.

You can choose from these widgets:

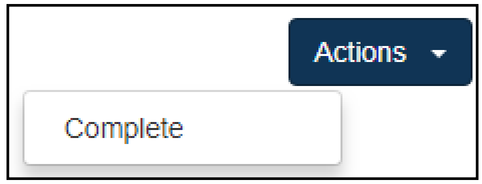
5.4.0.1 Current Tasks

Shows all In Progress tasks:



Click the plus icon to view additional details about a task, as shown here:

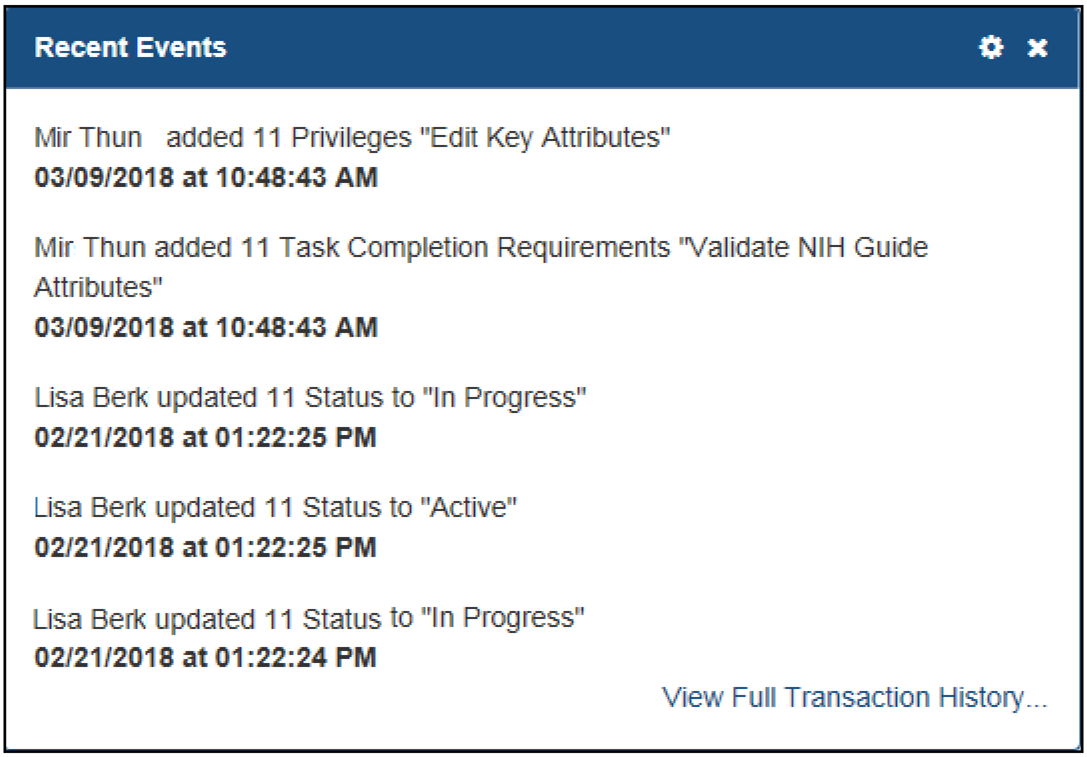
Click the *Actions* menu in this view to Complete the task:



(See Task Completion for more information.)

Note that, as in the example above, some *Task Detail* screens include a checklist that you must finish before you can complete the task: Check off all the tasks and then click **Complete**.

5.4.0.2 Recent Events



5.4.0.3 Milestones

Milestones

Milestone	Due Date	Status
Task Beta	10/24/2017	Completed
Review 2	01/07/2018	Not Started
Review 3	01/07/2018	Not Started
Downward Side Task	01/31/2018	Completed
1234	12/28/2019	Not Started

5.4.0.4 Posting History

Shows the history of public posting for this FOA.

And for published FOAs, you can click a link to view the FOA on Grants.gov or GrantSolutions.

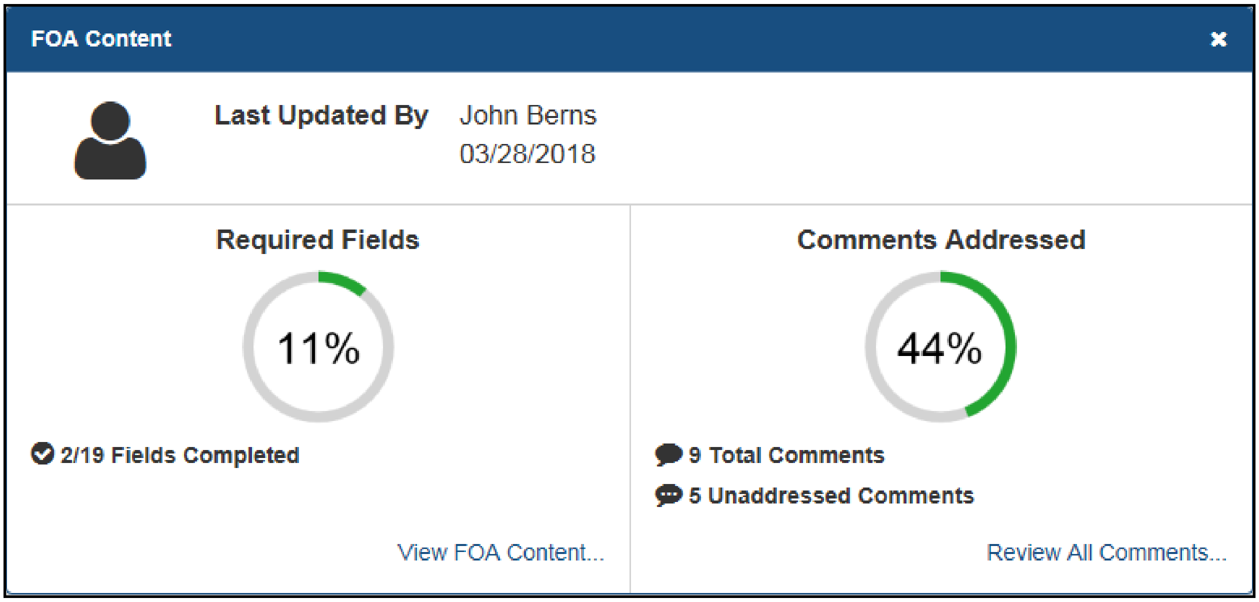
Posting History

External Site	Status	Last Posted
Grants.gov Forecast	Post Successful	04/04/2017 03:02:06 PM
Grants.gov Synopsis	Post Successful	03/23/2017 08:38:44 AM
Grants.gov Application Package(s)	Post Successful	03/24/2017 12:53:47 PM
Grants.gov Related Documents	Not Posted	

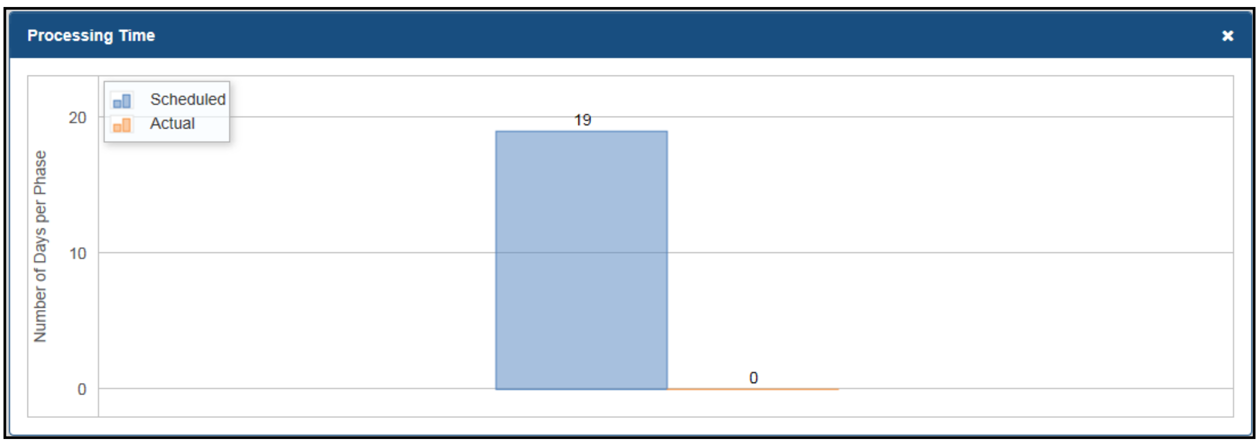
View Opportunity on Grants.gov...

5.4.0.5 FOA Content

Shows the percent of required fields that have been completed and reviewer comments that have been received and addressed:



5.4.0.6 *Processing Time*



5.5 Exception Requests

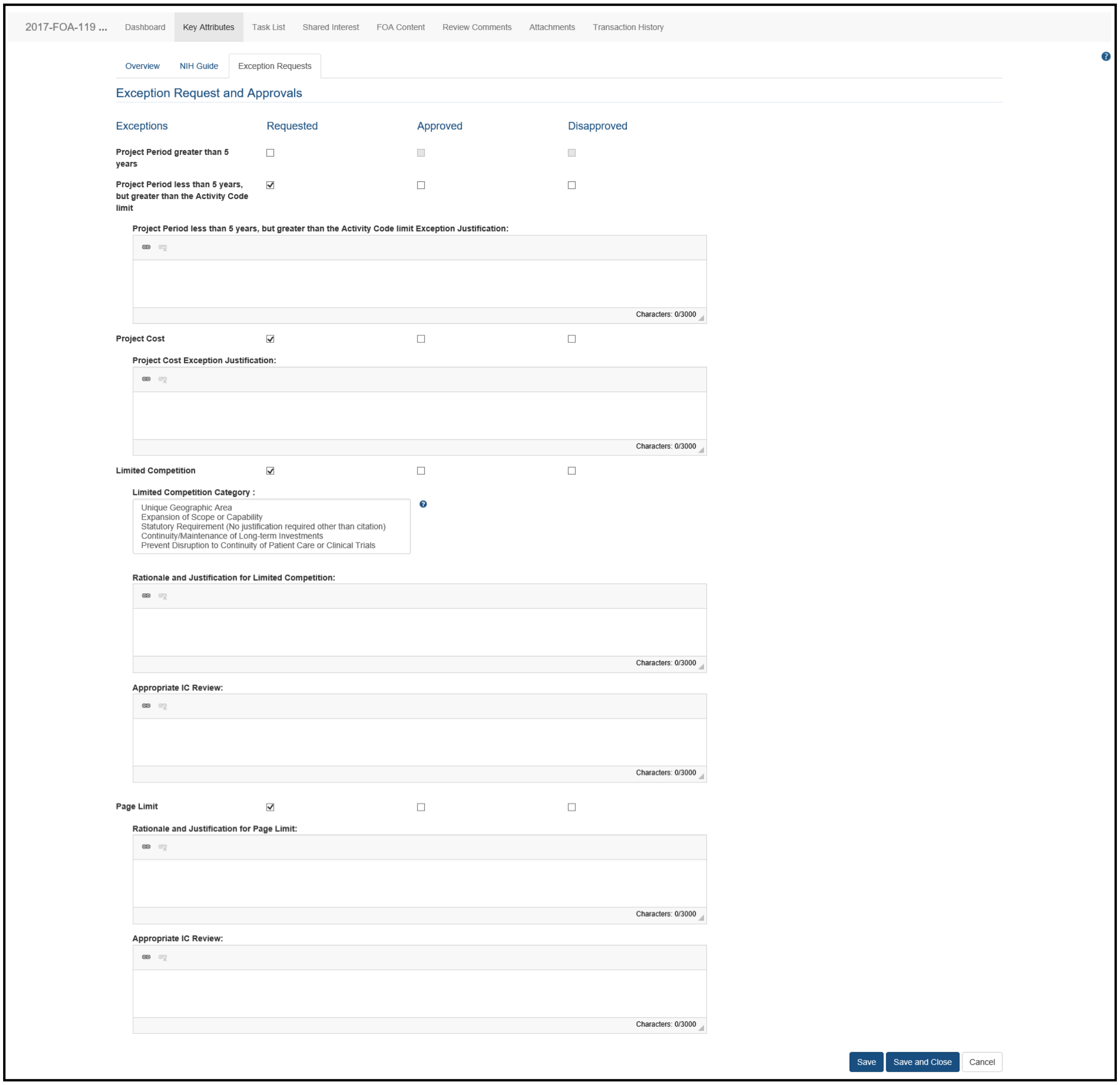
This screen opens when you click the Exception Requests tab, as shown below.

FOAM Admins and users who have been assigned a task with 'Edit Key Attributes' privilege can use this screen to request exceptions to certain IC and OEP policy standards.

IC and OEP officials use it to approve or disapprove these requests.

See below for instructions.

Note: This tab is not available for 'Notice' FOA types.



Requesting Exceptions

1. FOAM Admins and users who have been assigned a task with 'Edit Key Attributes' privilege can put a check in the Requested column to request one or more of these exception types:
   - Project Period Greater Than 5 Years
   - Project Period less than 5 years, but greater than the Activity Code limit (LT5Y)
   - Project Cost
   - Limited Competition
   - Page Limit

2. Enter justification for the exemptions:
    - When you check the Requested box for **Page Limit** exception, two text fields appear below it: *Rationale and Justification for Exception*, and *Appropriate IC Review*, as shown above. The text you enter in these fields is used by the Guide staff to evaluate and approve your request.

    - The *Rationale and Justification for Exception*, and *Appropriate IC Review* text fields also appear when you check the Requested box for ***Limited Competition*** exception. And additionally, a drop-down menu opens beneath the field, as shown above. Use the menu to specify the limited competition category of the exemption, such as "Unique Geographic Area" or "Expansion of Scope or Capability." And note that you can click the help icon next to this menu to see descriptions of the available categories.

    - When you check the Requested box for **Project Period less than 5 years, but greater than the Activity Code limit** or **Project Cost**, a text area appears where you can enter the justification for the exception.

3. Click **Save** at any time to save your changes. Click **Save and Close** when you're finished: When you save an exception request, it is routed to OEP for approval.

Approving/Disapproving Requests

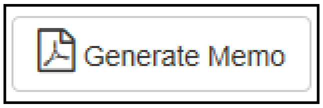
Users with approval authority can use the *Approved* and Disapproved checkboxes to resolve requests.

Note: Limited Competition and Page Limit exceptions have three possible approval outcomes driven by the corresponding post-completion actions:

1. IC Approval – puts the digital signature of the IC Approving Official under the corresponding exception.
2. OEP Approve exception – puts the digital signature of the OEP Director under the corresponding exception, and allows the PDF of the exception memo to be generated.
3. OEP Disapprove exception

5.5.0.1 Generate Memo

When a **Page Limit Exception** or **Limited Competition Exception** is approved by OEP Director, a **Generate Memo** button appears below the exception, as shown here:



Click the button to generate a PDF of the exception memo. A dialog box will open giving you the option to open or save the PDF.

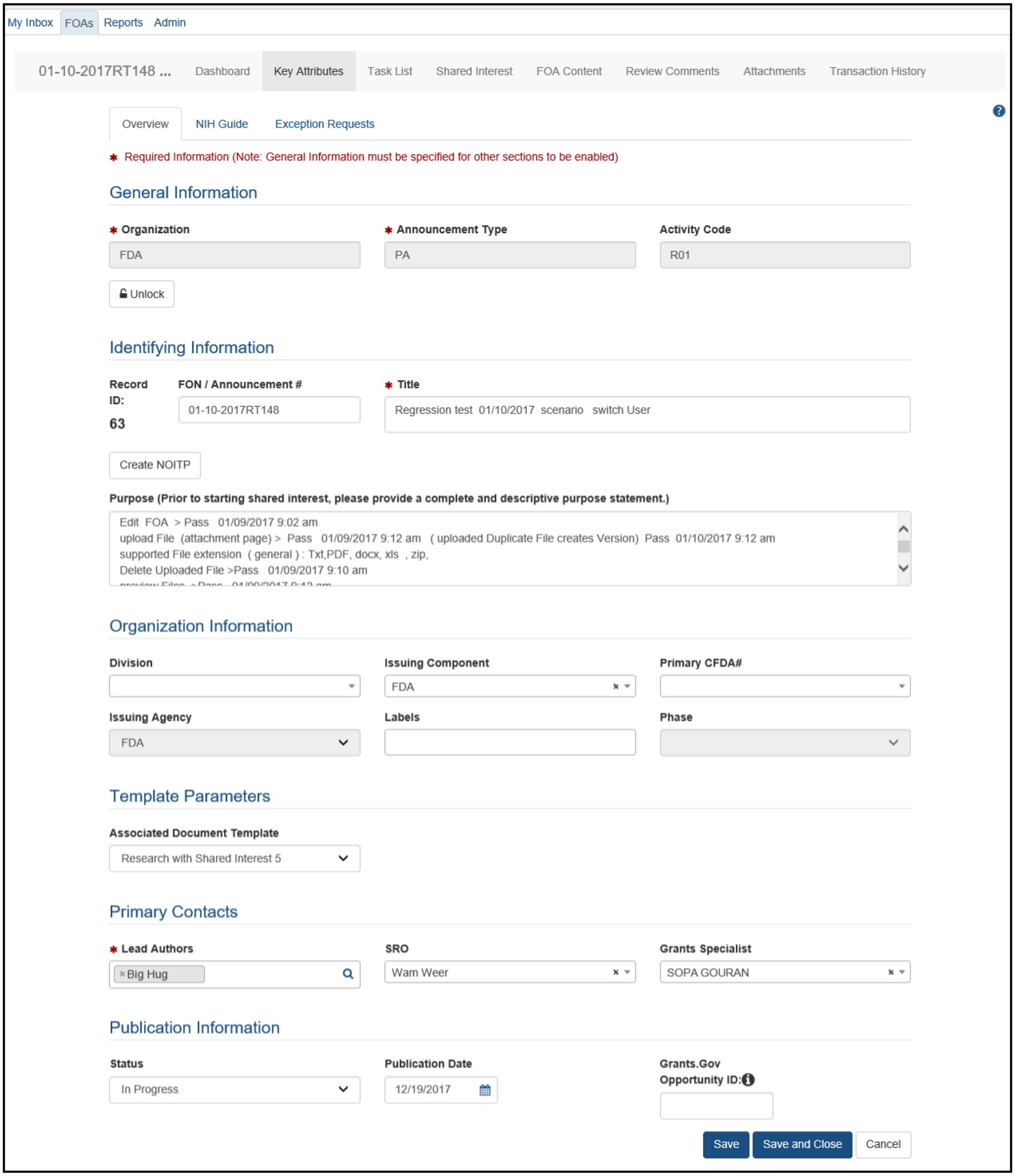
5.6 FOA Key Attributes tab: Overview

FOAM Admins and users who have been assigned a task with "Edit Key Attributes" privilege can use the FOA *Key Attributes* tab to configure properties that identify the FOA and control some aspects of its publication.

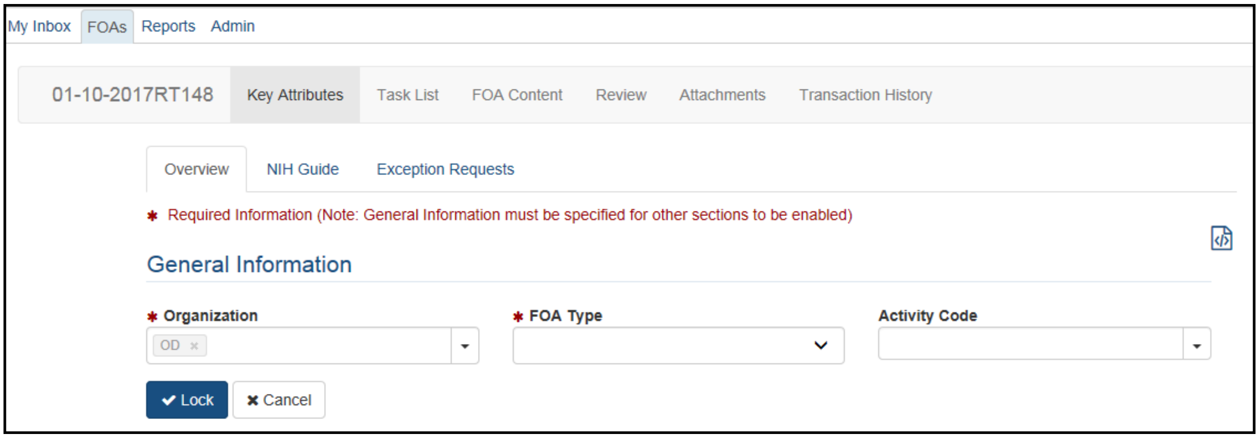
When you click the *Key Attributes* tab in the menubar, it opens to the *Overview* sub tab, as shown here.

NIH users can also click the NIH Guide tab to manage the information about the FOA that will be published in the NIH Guide, or click the Exception Requests tab to manage exceptions.

See below for instructions on editing the properties in the *Overview* tab.



Note: To edit the fields in the **General Information** area (*Organization*, *FOA Type*, and *Activity Code*), you must first click the **Unlock** button. Then, make your changes and click the **Lock** button to lock your selections, as shown here:



Only after the General Information fields are set and locked will all of the other fields and the complete range of configuration options be available.

1. Set these attributes to configure the FOA:

Key Attributes

Field	Description
FON	The unique identifier of the FOA; If you don't manuallyenter a value, FOAM generates a FON. **Note**: For FOA types PA/PAR/PAS, only Agency Admins and eRA FOAM Admins can edit this field. **Note**: For FOA type OTA, users cannot manually enter the FON: You must use the system-generated FON.
Announcement Type	Choose an announcement type: ◦ Notice of Change to Funding Opportunity ◦ Notice of Information ◦ Notice of Intent to Publish (Note: You can't set this value here: Use the **Create NOITP** button to create a Notice of Intent to Publish.) ◦ OTA ◦ PA ◦ PAR ◦ PAS ◦ Policy Notice

Key Attributes

Field	Description
	◦ Request for Information ◦ Request for Proposals ◦ RFA
Title	Title of the FOA (Up to 250 characters) Note: The FOA Title is visible on all FOA tabs when you hover the mouse over the announcement number.
Download as XML	Click the download button at the top of the screen as shown below, to download an XML version of the Key Attributes.  The Download as XML label appears when your mouse passes over the button.
Create NOITP	This button is available for Admin users only. Click to create a Notice of Intent to Publish for the FOA you are viewing. When you click this button, a new *FOA Key Attributes* window opens, with a the **FOA Type** field set to *Notice of Intent to Publish and the title set to* and the Title set to "*Notice of Intent to Publish<title of associated FOA>*" Also the screen will have no **Create NOITP** button: In its place will be a link back to the associated FOA, as shown here:  Use the other fields in the screen to define the NOITP, then click Save. **Note**: When the NOITP is created, the title, purpose, lead author, organization, and issuing component will be pre-populated from the FOA.

Key Attributes

Field	Description
Purpose	Provide a complete and descriptive purpose statement.
Organization	the organization issuing the FOA
Division	The division within the issuing organization, if applicable
Issuing Component	The office or other component within the issuing organization, if applicable
Primary CFDA #	After you select an Issuing Component, this field is populated with the available CFDA (Primary Catalog of Federal Domestic Assistance) numbers for the Issuing Component. Select a number from the drop-down menu.
Labels	Select labels to apply to this FOA.
Phase	The FOA's phase, if applicable
Primary CFDA #	After you select an Issuing Component, this field is populated with the available CFDA (Primary Catalog of Federal Domestic Assistance) numbers for the Issuing Component. Select a number from the drop-down menu.
Issuing Agency	The issuing agency
Activity code	The activity code associated with the FOA: Begin typing the code or select it from the drop-down menu.
Associated document template	Select the document template to use for this FOA. **Note**: You can change the template on an existing FOA, but you should proceed cautiously: When you change the template on an FOA, the policy language from the old template is overwritten, and any data elements in the old template that are not also in the new template are removed: So if you have already added content to any data elements in the FOA, you should confirm that those data elements also exist in the new template: otherwise the data in those sections may be removed. When you change the document template and attempt to save the FOA, a confirmation dialog opens to remind you of the risk of data loss, and gives you a final chance to cancel the change.

Key Attributes

Field	Description
Lead Authors	This field defaults to the user who created the FOA. To select a different lead author or add additional authors, click the magnifying glass icon: A pop-up Person Search window will open, as shown below. Perform the search and click on the person's name to make your selection and close the pop-up window. To remove an author from this field, click the small **x** next to the name.
SRO	Select the Scientific Review Official for this FOA: Begin typing the name and FOAM will attempt to match it to users who have the SRO role — when the correct name appears, click to select it.
Grants Specialist	Select the Grants Specialist for this FOA: Begin typing the name and FOAM will attempt to match it to users who have the GMS or GMO role — when the correct name appears, click to select it.
Status	Current status of the FOA: Not Started, In Progress, Published, Archived, On Hold, or Cancelled. Note: The Status automatically changes to “In Progress” when the first FOA task is started. Note: Notice of Intent to Publish FOAs are marked as cancelled if associated FOA is not published within 12 months.
Publication Date	For NIH FOAs, select the date of publication in the NIH Guide.
NIH Guide Publication	When an NIH FOA is published, the Status field is set to *Published* and an **NIH Guide Publication** link appears next to the Publication Date field, as shown above: Click this link to view the FOA in the NIH Guide. FOA is Published and the FOA type is one of the notice types, display Guide Link read only field - link to the published FOA in the NIH Guide. The link is constructed based on the FOA# and type: "https://grants.nih.gov/grants/guide/notice-files/"FOA #".html"
Grants.Gov Opportunity ID	Enter the Opportunity ID in order to create a link in this FOA to the published FOA on Grants.gov.

2. When you finish configuring these fields, click **Save** or **Save and Close**.

pop-up Person Search window:

Other FOA Tabs

Click the links in the top nav bar to open these other tabs for the FOA:

- Task List — Create and manage FOA task lists
- FOA Content — See an overview of all FOA content
- Review — View and respond to reviewer comments
- Attachments — Use to attach documents to the FOA and to manage such attachments.
- Transaction History — See all transactions that have been performed on the FOA

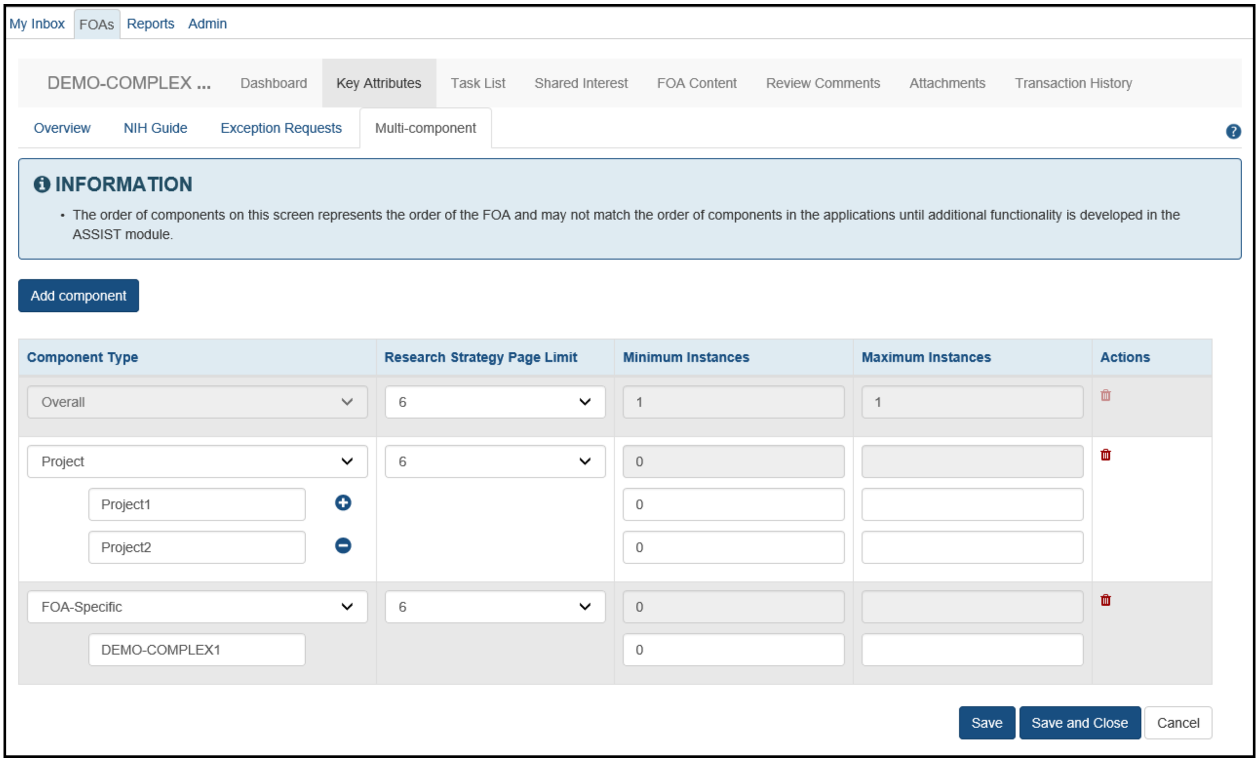
5.7 Multi-component tab

This screen opens when you click the *Multi-component* tab, as shown below.

Use this screen to add components to create complex multi-component FOAs.

See below for instructions.

Note: This tab is available for FOAs with the following activity codes: G12, OT3, P01, P20, P2C, P30, P40, P41,P42, P50, P51, P60, PM1, PN1, PN2, S06, U10, U19, U2C, U41, U42, U45, U54, U55, U56, U84, U90, UC7, UG4, UM2.



Add Component

1. To add a component, click the **Add Component** button or the plus icon to add a new component row to the grid. (And click again to add additional component rows.)
2. In the new row, select the *Component Type* from the drop-down menu and set the other properties in the row as needed. See the table below for information on these properties.
3. When you select a ComponentType, a text field appears below the drop-down, as shown above. Use this field to enter a name for the component. (By default, the name is the component type.)
4. If you want to delete a component row, click the trash icon or the minus icon.
5. Click **Save** at any time to save your changes, and when you're finished configuring components, click **Save and Close**.

Component Properties

Field	Description
Component Type	Select the type of component:

Component Properties

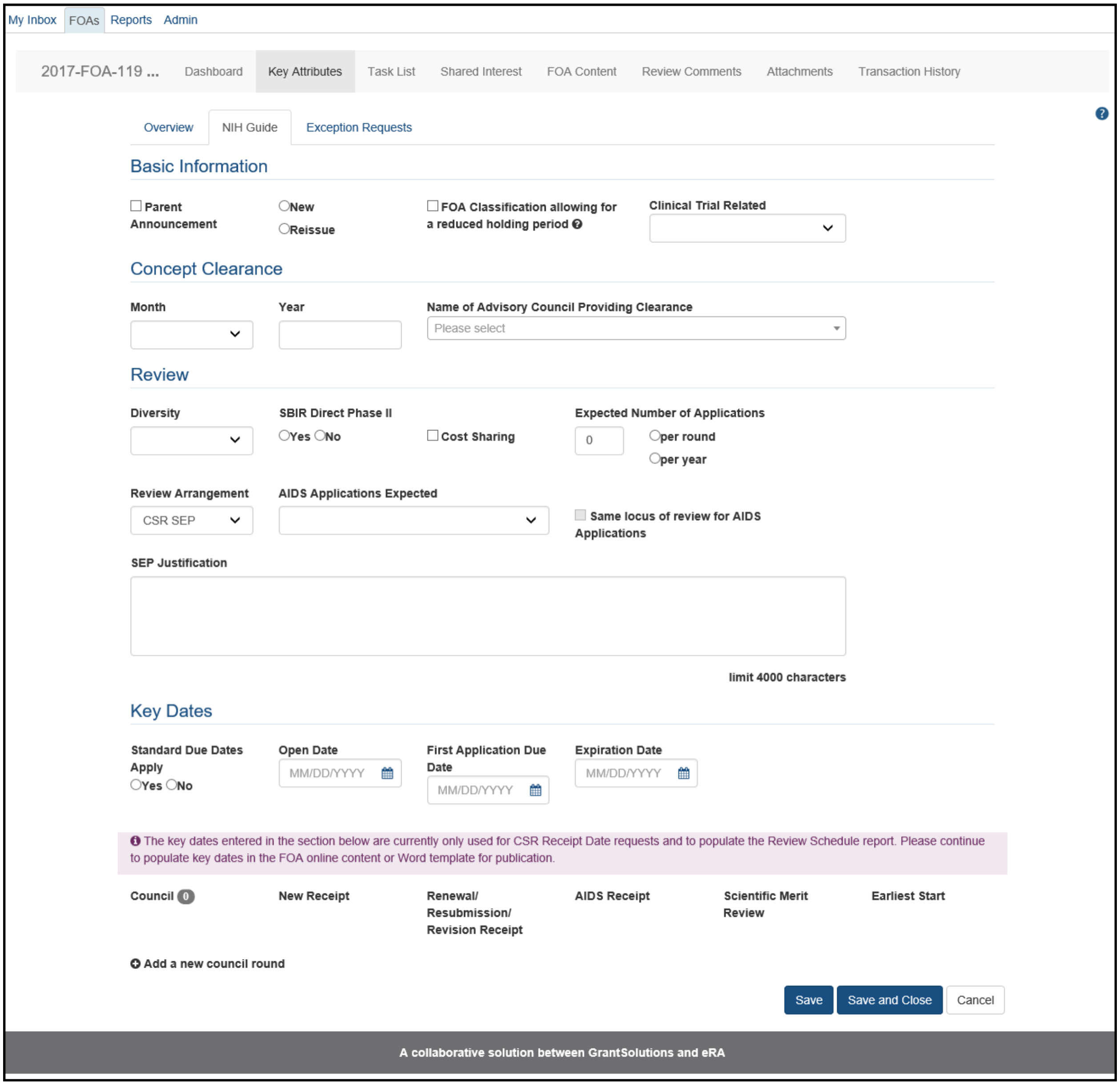
Field	Description
	◦ Overall ◦ Admin Core ◦ Career Development ◦ Complex Component ◦ Core ◦ FOA-Specific ◦ Individual Career Development ◦ Institutional Career Development ◦ NRSA Training ◦ Project **Note:** You can add multiple FOA-Specific components, but only one instance of each of the other component types. And you also must enter a project description for each FOA-specific component.
Name	When you select a Component Type, a text field appears below the drop-down. Use this field to enter a name for the component. (By default, the name is the component type.)
Research Strategy Page Limit	Select the page limit for Research Strategy attachments to submitted grant applications (default = 6).
Minimum Instances	Enter 0 or positive integer.
Maximum Instances	Enter positive integer or leave blank for no maximum.
Actions	Click the trash icon to delete a component.

5.8 FOA Key Attributes: NIH Guide tab

NIH ONLY

FOAM Admins and users who have been assigned a task with 'Edit Key Attributes' privilege can use the *Key Attributes: NIH Guide* tab to configure properties that are used by OEP to review the FOA.

Note: This tab is not available for 'Notice' FOA types.



This screen contains the fields described below.

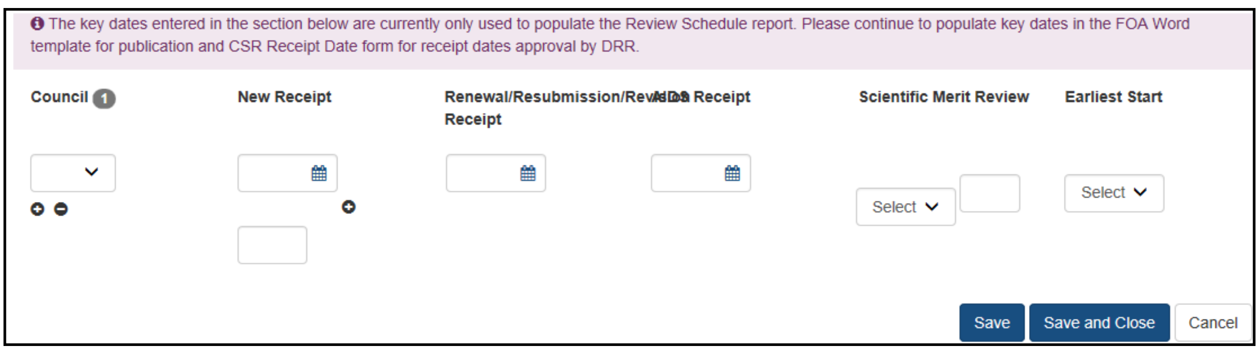
Edit these fields as needed and click >**Save** or **Save and Close** to save your changes.

Field	Description
Parent Announcement	Is this a parent announcement? **Note**: Only Agency Admins and eRA FOAM Admins can edit this field
New/Reissue	Is this a new FOA or a reissue of a previously published FOA?
FOA Classification allowing for a reduced holding period	Does this FOA have one of the classifications that allows the holding period to be reduced? Check only if the FOA falls under one of the following classifications: Genes and Environment Initiative (GEI), Genome Wide Association Studies (GWAS), Neuroscience BluePrint, Common Fund, Superfund, OppNet.
Clinical Trial Related	Is this FOA related to a clinical trial? Select *Basic Trial*, *Not Allowed*, *Optional*, *Required*, or *Required (Infrastructure)*.
Concept Clearance	
Month	Select month when this FOA was cleared by the advisory council
Year	Enter year when this FOA was cleared by the advisory council
Name of Advisory Council Providing Clearance	Select The advisory council that provided the clearance for the concept.
Review	
Diversity	Specify how this FOA encourages diversity: ◦ *Diversity-targeting* (primary purpose to increase diversity), ◦ *Diversity-related* (requires a plan for enhancement of diversity) ◦ *Not applicable* (neither, but FOA encourages diverse applicants)

Field	Description
SBIR Direct Phase II	Is this FOA an SBIR/STTR in Direct phase 2?
Cost Sharing	For NOITP records, this field is present so you can indicate whether cost sharing is taking place in the target FOA. This property is also displayed in the HHS Forecast Export report.
Expected Number of Applications	Enter the expected number of applications in the box, (up to 5 digits), and click the radio button to indicate whether this is the expected number per round or per year.
Review Arrangement	Select the Review Arrangement: CSR, CSR SEP, or IC.
SEP Justification	This field is only present if the *Review Arrangement* field is set to "CSR SEP." Enter the justification for using Center for Scientific Review Special Emphasis Panel (CSR SEP).
AIDS Applications Expected	◦ If no AIDS-related applications are expected for this FOA, set this field to "No AIDS Applications Expected." ◦ If AIDS-related applications are expected, set this field to "AIDS Applications Expected" or "Only AIDS Applications Allowed." **Note:** If you choose one of these settings, you may also need to enter information in the *AIDS Funding* tab.
Same locus of review for AIDS Applications	This field is only present if the *AIDS Applications Expected* field indicates that AIDS-related applications are expected. Click if AIDS-related applications will have the same locus of review.
Key Dates	
Standard Due Dates Apply **Open Date** **First Application Due Date**	Select Yes or No: Do Standard Due Dates Apply? And use the calendar pickers to set the other key dates.

Field	Description
Expiration Date	
Council **New Receipt** **Renewal/Resubmission/Revision Receipt** **AIDS Receipt** **Scientific Merit Review** **Earliest Start**	Enter key receipt dates for council rounds that will be listed the Review Schedule report. To do so, click Add a new council round to add a council round date row to the grid, as shown below. Then use the calendar pickers to set the relevant dates.

Add Council Dates:



If necessary, click the plus or minus icons to add or remove council round date rows from the grid.

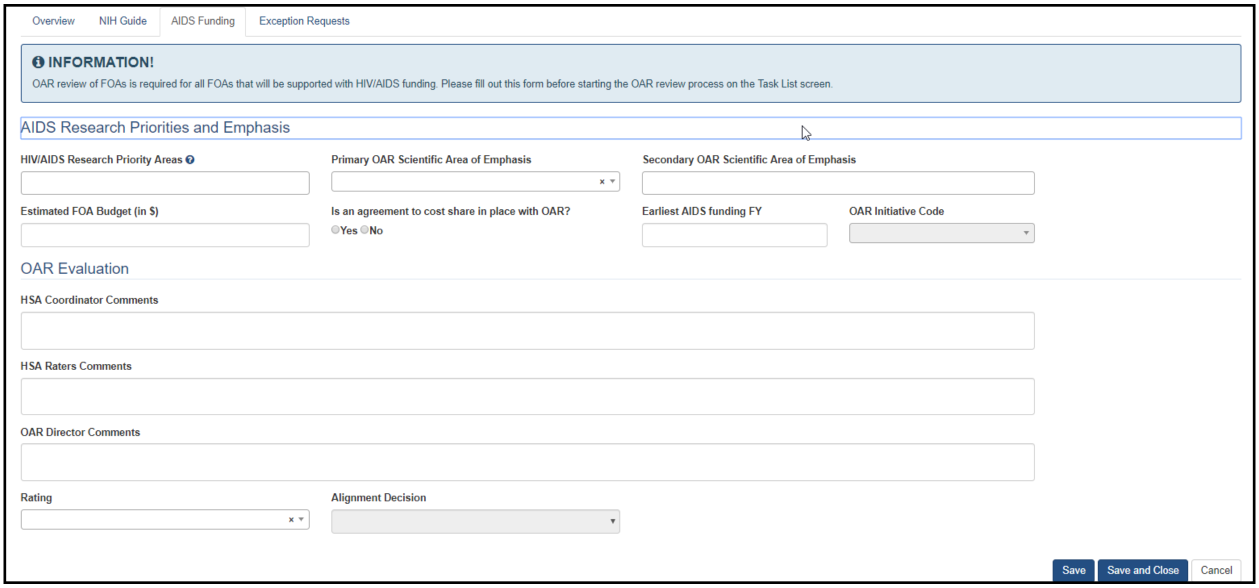
Note: You can add up to 12 council rounds, but each round can only be used once.

5.9 AIDS Funding

The *AIDS Funding* tab shown below is present in the *FOA Key Attributes* screen if the *AIDS Applications Expected* field in the NIH Guide tab is set to "AIDS Applications Expected" or "Only AIDS Applications Allowed."

FOAM users with Edit Key Attributes privilege on the FOA can use this screen to enter AIDS funding information.

NOTE: Review by the Office of AIDS Research (OAR) is required for all FOAs that will be supported with HIV/AIDS funding. Please fill out this form before starting the OAR review process on the Task List screen.



This screen contains the fields described below.

Enter data in these fields as needed and click **Save** or **Save and Close** to save your changes.

AIDS Research Priorities and Emphasis

- HIV/AIDS Research Priority Areas
- Primary OAR Scientific Area of Emphasis
- Secondary OAR Scientific Area of Emphasis
- Estimated FOA Budget (in $)
- Is an agreement to cost share in place with OAR?
- Earliest AIDS funding FY
- OAR Initiative Code

OAR Evaluation

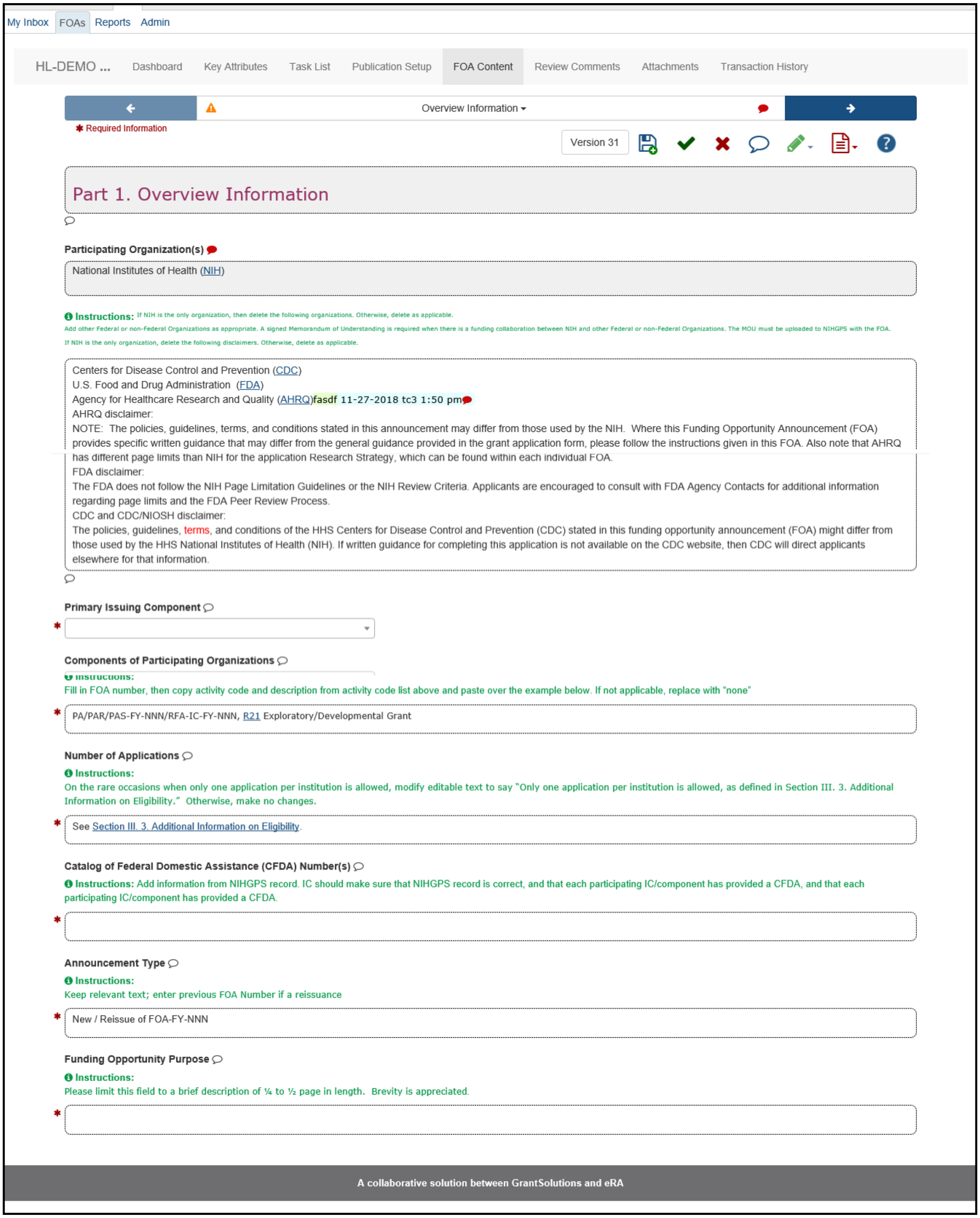
- HSA Coordinator Comments (displayed for OAR staff only)
- HSA Raters Comments (displayed for OAR staff only)
- OAR Director Comments (displayed for OAR staff only)

- Rating (displayed for OAR staff only)
- Alignment Decision

5.10 FOA Content tab

The The FOA content tab, shown below, contains all the content of the FOA.

All users with access to a FOA can review the FOA content, but you can only edit FOA content or address comments if you have the FOA Admin user role, or if you have been granted editing privileges by an in-progress FOA task.

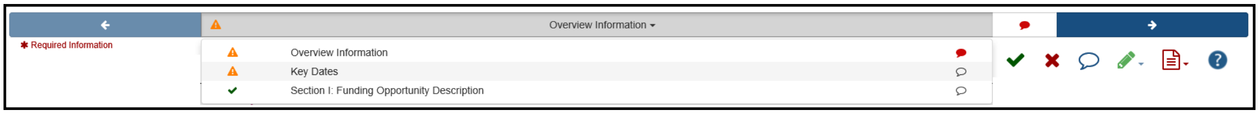

My Inbox
FOAs
Reports
Admin
HL-DEMO ...
Dashboard
Key Attributes
Task List
Publication Setup
FOA Content
Review Comments
Attachments
Transaction History
Overview Information
* Required Information
Version 31
Part 1. Overview Information
Participating Organization(s)
National Institutes of Health (NIH)
Instructions: If NIH is the only organization, then delete the following organizations. Otherwise, delete as applicable.
Add other Federal or non-Federal Organizations as appropriate. A signed Memorandum of Understanding is required when there is a funding collaboration between NIH and other Federal or non-Federal Organizations. The MOU must be uploaded to NIHGPS with the FOA.
If NIH is the only organization, delete the following disclaimers. Otherwise, delete as applicable.
Centers for Disease Control and Prevention (CDC)
U.S. Food and Drug Administration (FDA)
Agency for Healthcare Research and Quality (AHRQ)fasdf 11-27-2018 tc3 1:50 pm
AHRQ disclaimer:
NOTE: The policies, guidelines, terms, and conditions stated in this announcement may differ from those used by the NIH. Where this Funding Opportunity Announcement (FOA) provides specific written guidance that may differ from the general guidance provided in the grant application form, please follow the instructions given in this FOA. Also note that AHRQ has different page limits than NIH for the application Research Strategy, which can be found within each individual FOA.
FDA disclaimer:
The FDA does not follow the NIH Page Limitation Guidelines or the NIH Review Criteria. Applicants are encouraged to consult with FDA Agency Contacts for additional information regarding page limits and the FDA Peer Review Process.
CDC and CDC/NIOSH disclaimer:
The policies, guidelines, terms, and conditions of the HHS Centers for Disease Control and Prevention (CDC) stated in this funding opportunity announcement (FOA) might differ from those used by the HHS National Institutes of Health (NIH). If written guidance for completing this application is not available on the CDC website, then CDC will direct applicants elsewhere for that information.
Primary Issuing Component
Components of Participating Organizations
Instructions:
Fill in FOA number, then copy activity code and description from activity code list above and paste over the example below. If not applicable, replace with "none"
PA/PAR/PAS-FY-NNN/RFA-IC-FY-NNN, R21 Exploratory/Developmental Grant
Number of Applications
Instructions:
On the rare occasions when only one application per institution is allowed, modify editable text to say "Only one application per institution is allowed, as defined in Section III. 3. Additional Information on Eligibility." Otherwise, make no changes.
See Section III. 3. Additional Information on Eligibility.
Catalog of Federal Domestic Assistance (CFDA) Number(s)
Instructions: Add information from NIHGPS record. IC should make sure that NIHGPS record is correct, and that each participating IC/component has provided a CFDA, and that each participating IC/component has provided a CFDA.
Announcement Type
Instructions:
Keep relevant text; enter previous FOA Number if a reissuance
New / Reissue of FOA-FY-NNN
Funding Opportunity Purpose
Instructions:
Please limit this field to a brief description of ¼ to ½ page in length. Brevity is appreciated.
A collaborative solution between GrantSolutions and eRA

Sections

The FOA is divided into multiple sections based on the document template associated with it. See Document Templates for more information.

IMPORTANT: Note that you must complete all required fields (fields (marked with an asterisk *) in every section of the FOA before submitting it to OEP for review.

Use the navigation bar at the top of the screen tomove between sections: Click to choose a section from the drop-down menu, or click the arrows to scroll through the sections:



Note: FOA content is saved automatically whenever you move to another section. You can also save at any time by clicking the **Save** button, which saves the current content as a new version.

5.10.0.1 Data Elements

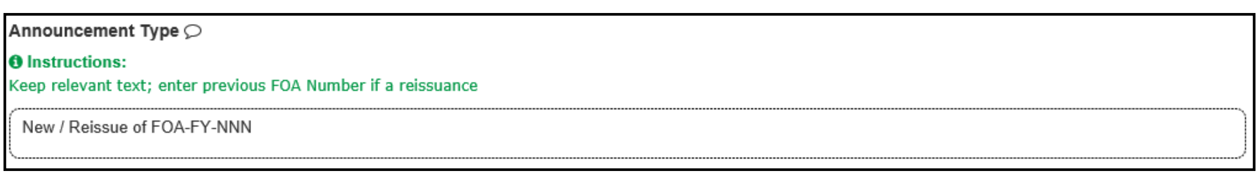
Each section of the FOA may contain the following types of data elements:

- Editable fields – text entry fields, some of which may be prepopulated with default content. Note that editable text fields are denoted by a dashed outline. See below for tips on working with editable content.
- Policy language – content that is included in the final document but is not editable except by Agency Admins. Policy text fields have a grey background surrounded by a dashed outline.
- Instruction language – Be aware of special instructions (in green text), which offer guidance on completing some fields.

Editing FOA content:

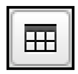
There a few standard types of editable fields used in FOAs:

- **Enter text:** Some fields require you to type text into an empty field, as shown below.

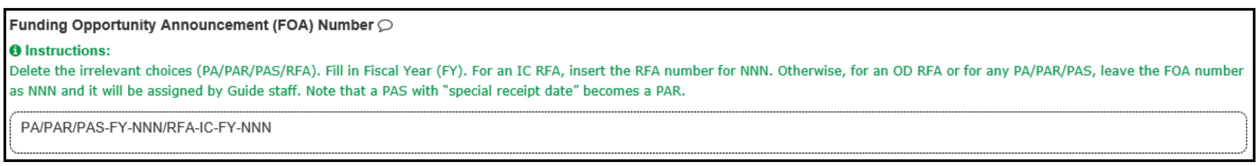


Note: When you enter a properly formed URL (http:// or https://) in a FOA Content field, FOAM automatically converts it into a hyperlink.

- **Enter rich text:** And some text fields allow you enter rich (i.e., formatted) text: Click the text field to display a row of formatting tools above the field, as shown below.
 Type text into the field using the formatting tools just as in a word processing program, or copy-and-paste formatted text from MS Word.

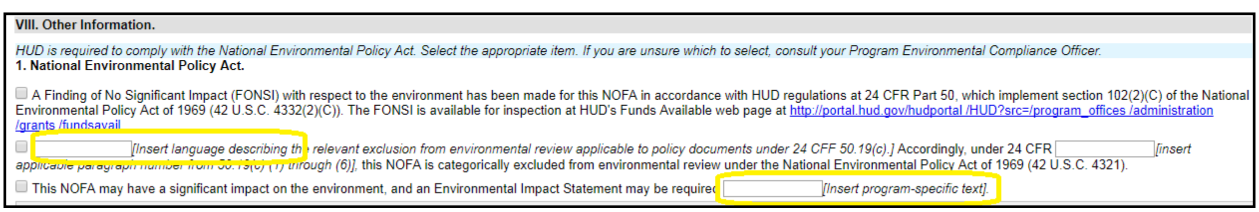
Note that you can click the  table button to open the table editor and add a table to the field.

- **Edit prepopulated content:** Other fields require you to edit prepopulated content, often by deleting the parts that you don't want to keep, as in this example:

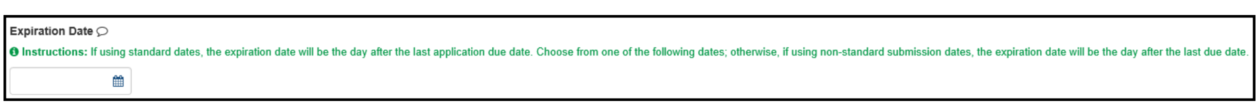


Notice the green instructional text that explains what to do.

- **Enter inline text:** Some data elements have an entry field inline with the text, where you can enter the specified information, as shown here:

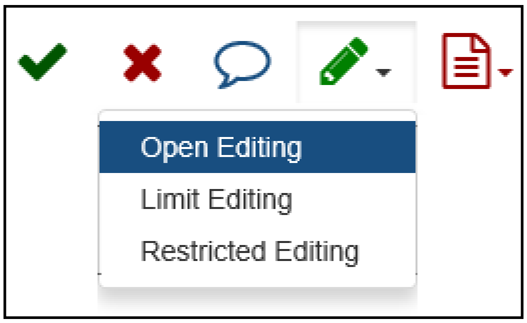


- **Calendar picker:** Type a date or click the calendar icon to pick a date.



5.10.0.2 Edit Modes

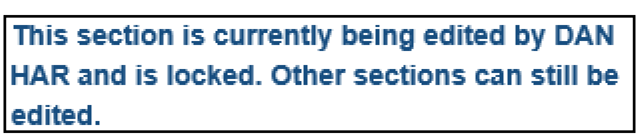
Agency Admins can manually turn on and off limited editing of the FOA content to prevent IC users from deleting comments or accepting/rejecting changes when returning edits to the Guide after addressing Guide recommendations, so that the Guide staff can easily see what was updated. Click the green pencil icon at the top of the screen to open the **Open Editing** drop-down menu to set the edit mode, as shown here:



- **Open Editing** — Editing is open to all users with editing privileges.
- **Limit Editing** — IC users can make limited changes, but cannot change or delete user comments.
- **Restricted Editing** — Only Agency Admins can edit FOA content and add or address comments.

5.10.0.3 Note: About content locking:

- When you start editing a FOA section, that section is locked for editing by other users.
- When you have a section locked, the lock will be released after 30 minutes of inactivity, or after you click **Save**, or move to another FOA section, or to another screen.
- Before the system releases a lock due to inactivity, it saves the FOA content as a new version.
- When you try to access a section that is locked by another user, a message notifies you that the section is locked and shows the name of the user who locked it:



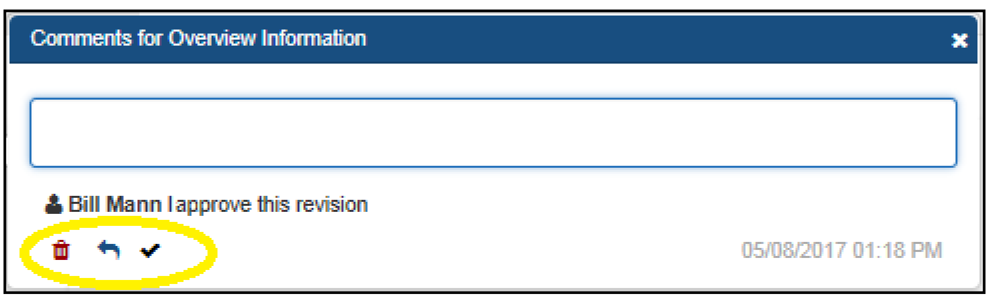
Comments

You can enter comments about the FOA as a whole, about the individual sections, and about elements within the sections.

1. Click the comment bubble on any of these elements to open the comment screen, as shown here:

2. Type your comment in the text box and hit the Enter key to save it.

Note: The color of the comment bubble tells you the comment status for that element or section: A clear bubble indicates no comments have been entered; green means that all comments have been addressed, and red means that at least one comment has not been addressed.
And when you click on the comment bubble, the Comment screen opens and displays tools you can click to delete the comment, reply to it, or mark it as addressed, as shown here:



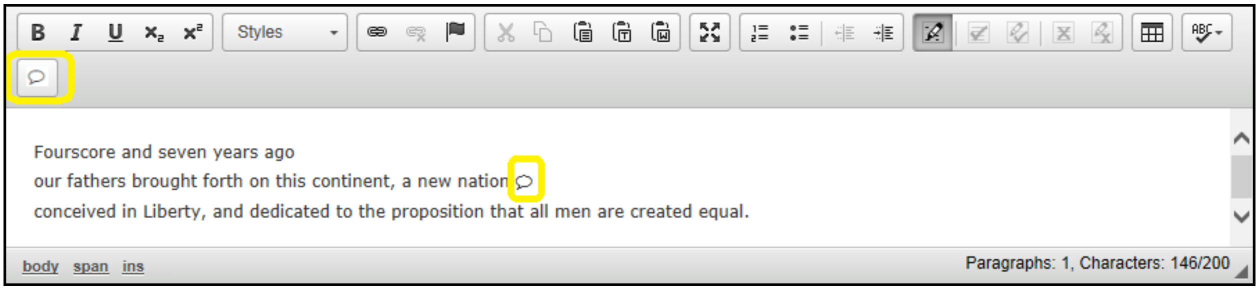
5.10.0.4 Inline Comments

And within a data element you can attach a comment to a specific line or place in the text.

Note: Only FOAM Admins and users who have been assigned to an in-progress task with the "Edit FOA Content" privilege can add and access inline comments:

1. To do so, put the mouse cursor at the spot in the text you want to refer to and click the comment tool in the formatting toolbar.

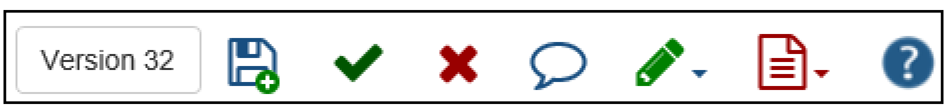
2. That will create a comment bubble at the place in the text where you put the cursor, as shown here:



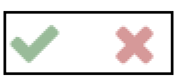
3. Click the inline comment bubble to add your comment at that spot in the text.

When you export the FOA Content in MS Word format, the inline comment will appear as a standard Word comment, linked to the text it refers to.

Other Controls

Click the icons at the top of the screen 

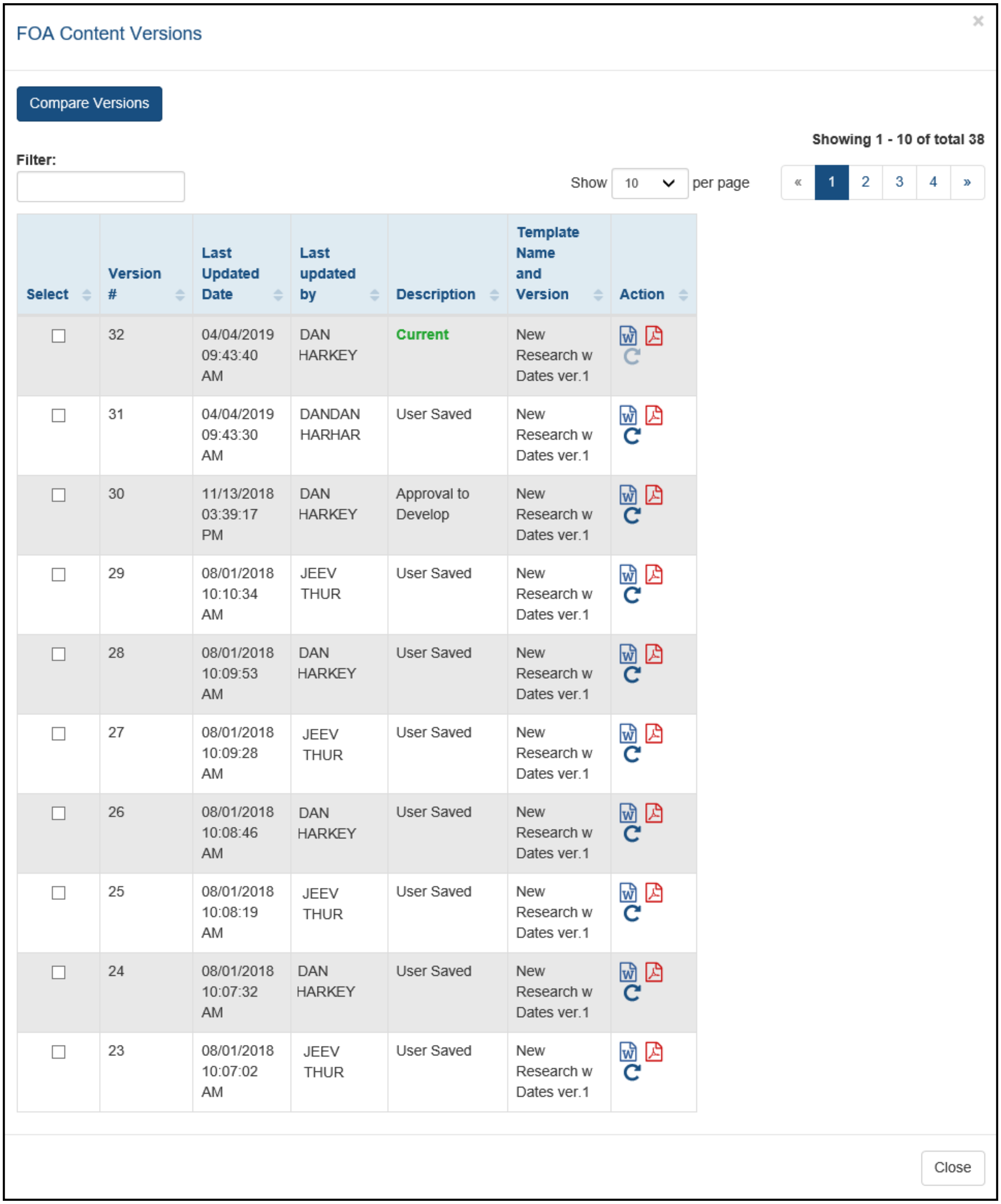
to perform these actions:

-  Use the Accept/Reject tools to accept or reject changes made to FOA content.
-  Click the comment bubble to add or read comments about the FOA

5.10.0.5 FOA Content Versions

Click the 

version button to open a list of past versions of the FOA content, as shown here:



FOA Content Versions

Compare Versions

Showing 1 - 10 of total 38

Filter:

Show 10 per page

« 1 2 3 4 »

Select	Version #	Last Updated Date	Last updated by	Description	Template Name and Version	Action
☐	32	04/04/2019 09:43:40 AM	DAN HARKEY	Current	New Research w Dates ver.1	
☐	31	04/04/2019 09:43:30 AM	DANDAN HARHAR	User Saved	New Research w Dates ver.1	
☐	30	11/13/2018 03:39:17 PM	DAN HARKEY	Approval to Develop	New Research w Dates ver.1	
☐	29	08/01/2018 10:10:34 AM	JEEV THUR	User Saved	New Research w Dates ver.1	
☐	28	08/01/2018 10:09:53 AM	DAN HARKEY	User Saved	New Research w Dates ver.1	
☐	27	08/01/2018 10:09:28 AM	JEEV THUR	User Saved	New Research w Dates ver.1	
☐	26	08/01/2018 10:08:46 AM	DAN HARKEY	User Saved	New Research w Dates ver.1	
☐	25	08/01/2018 10:08:19 AM	JEEV THUR	User Saved	New Research w Dates ver.1	
☐	24	08/01/2018 10:07:32 AM	DAN HARKEY	User Saved	New Research w Dates ver.1	
☐	23	08/01/2018 10:07:02 AM	JEEV THUR	User Saved	New Research w Dates ver.1	

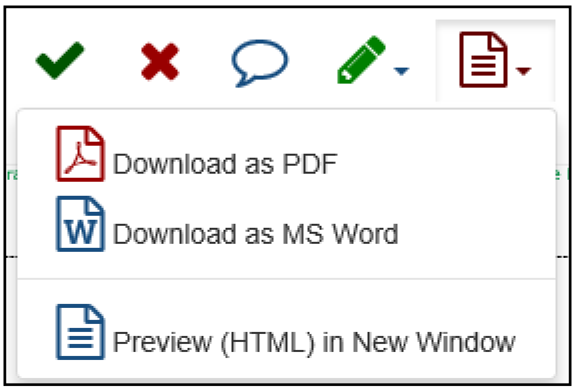
Close

Version actions

Click the action buttons to perform these actions on FOA versions:

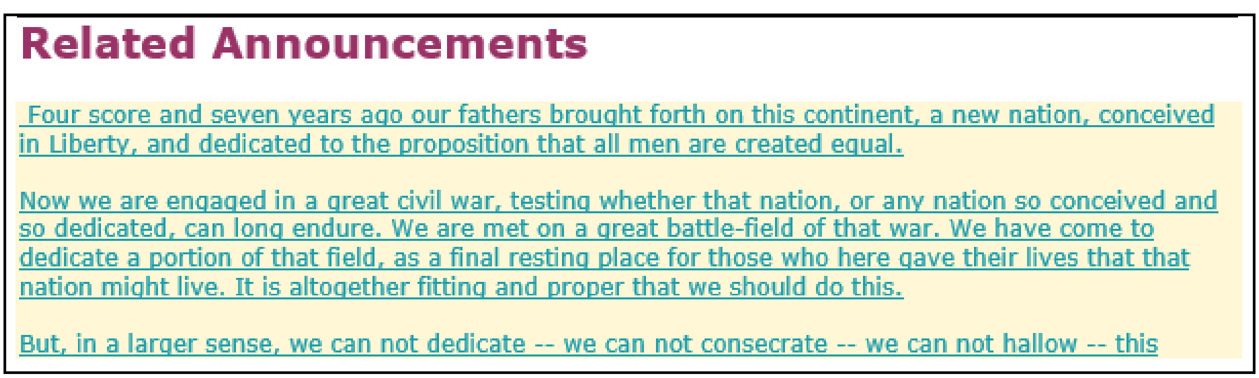
-  — View version as Word doc.
-  — View version as PDF
-  — Restore version: Click to revert to this version of the FOA content.

Exporting FOA Content

1. Click export icon in the page controls to open the Export menu, and select whether to download the FOA as a Word or PDF document , or to view it in your browser as an HTML page: 

You can use the different export modes to highlight different aspects of the content:

- For example, the HTML export is a functional Web page, so you can use it to check any hyperlinks you've added. And it omits all track changes markups, so you can preview the FOA in its final form.
- And in the Word export, FOA content that is editable is highlighted so you can easily spot it, as shown here:



Related Announcements

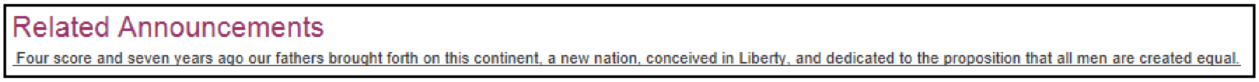
Four score and seven years ago our fathers brought forth on this continent, a new nation, conceived in Liberty, and dedicated to the proposition that all men are created equal.

Now we are engaged in a great civil war, testing whether that nation, or any nation so conceived and so dedicated, can long endure. We are met on a great battle-field of that war. We have come to dedicate a portion of that field, as a final resting place for those who here gave their lives that that nation might live. It is altogether fitting and proper that we should do this.

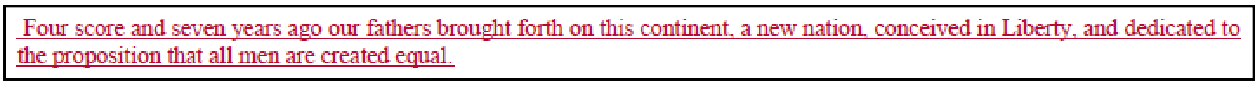
But, in a larger sense, we can not dedicate -- we can not consecrate -- we can not hallow -- this

- While in the HTML and PDF exports, underlining is used when "track changes" is turned on to identify changes in the content that have not yet been accepted:

  HTML:



  PDF:



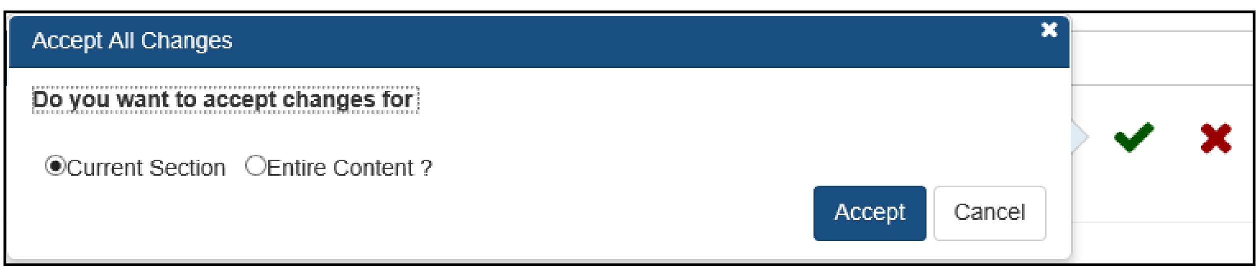
About Track Changes

Tracking is turned on automatically when a user begins typing in a data element.

And every tracked change must be accepted or rejected before the FOA Content can be finalized.

Use the tracking tools  in each data element to control tracking and accept or reject changes.

Note: The Accept/Reject tool allows you to accept or reject the changes made to individual sections, or to the entire content of the FOA, as shown here:



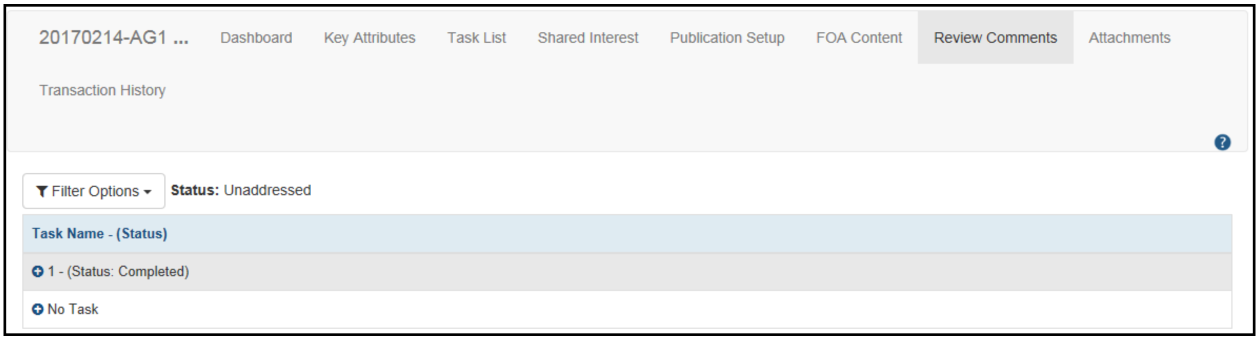
Note: Because every change must be accepted or rejected, it's a god idea to review and accept/reject each change you make as soon as you're done typing it.

Note: Only admin users and users assigned to an in-progress task that has Accept/Reject Changes privilege can accept or reject changes.

Note:Limit Editing: When returning edits to the Guide after addressing Guide recommendations, the FOAM Admin (or other user with editing privileges) can click the green pencil icon to put the FOA in Limited Editing mode, during which ICs cannot accept/reject tracked changes or delete user comments.

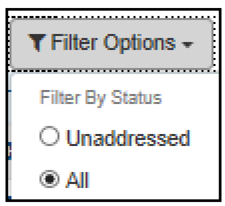
5.11 Review Comments tab

This screen shows all comments made on all tasks in the FOA Content screen.



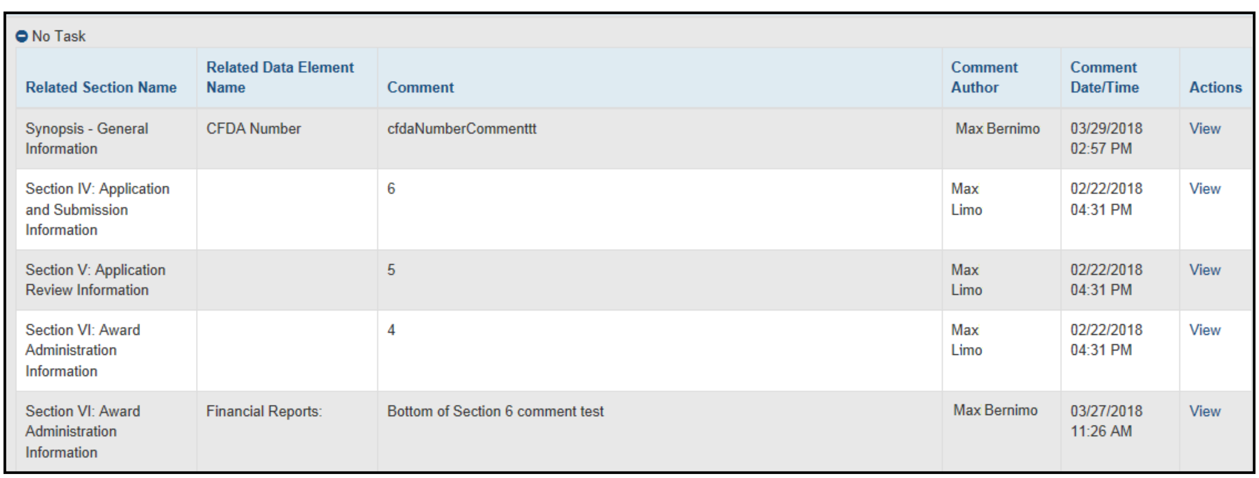
The *Review Comments* tab lists comments made while FOA tasks were in progress, sorted by task due date with the newest on top.

By default, only unaddressed comments are shown, but you can choose to view all comments in the *Filter Options menu, as shown here*:



Expanded Task View

Click the + icon next to a review task to expand the task and display all comments, as shown here:



Related Section Name	Related Data Element Name	Comment	Comment Author	Comment Date/Time	Actions
Synopsis - General Information	CFDA Number	cfdaNumberCommenttt	Max Bernimo	03/29/2018 02:57 PM	View
Section IV: Application and Submission Information		6	Max Limo	02/22/2018 04:31 PM	View
Section V: Application Review Information		5	Max Limo	02/22/2018 04:31 PM	View
Section VI: Award Administration Information		4	Max Limo	02/22/2018 04:31 PM	View
Section VI: Award Administration Information	Financial Reports:	Bottom of Section 6 comment test	Max Bernimo	03/27/2018 11:26 AM	View

The expanded view shows all comments made during the review, organized by the FOA section and then by fields within the sections.

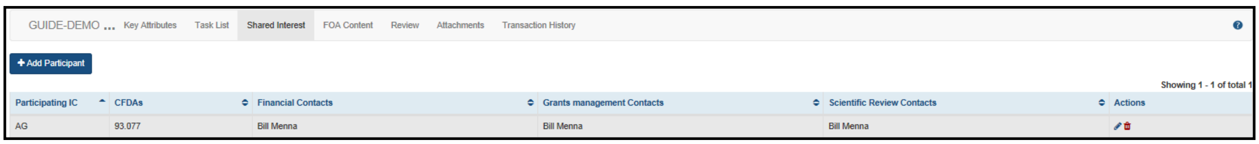
So comments on the FOA as a whole appear first, then comments about sections and then comments on the fields in the sections.

5.11.0.1 Actions

Click the **View** buttons to go directly to the associated comment in its section of the FOA Content or Publication Setup screen.

5.12 Shared Interest tab

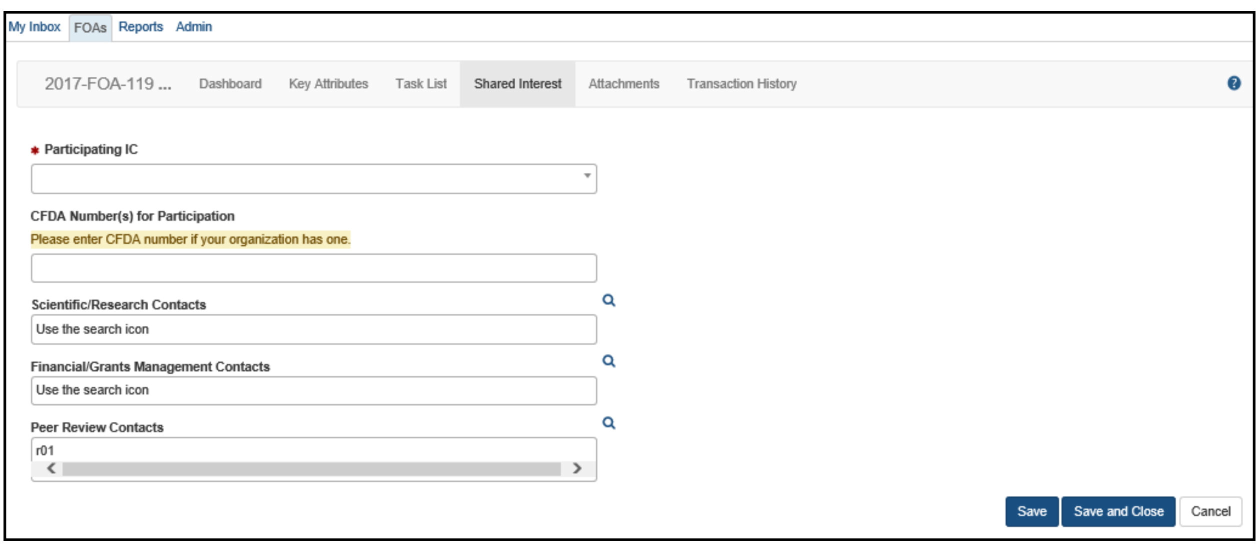
This screen lists the ICs that have expressed an interest in participating in this FOA.



Adding a shared interest record

FOAM Admins can use this screen to add a shared interest record, indicating that their IC is interested in participating in this FOA.

1. To add a shared interest record click **Add Participant**.
2. The *Shared Interest* screen opens, as shown here:



3. Enter the following information about your IC's participation in the FOA:

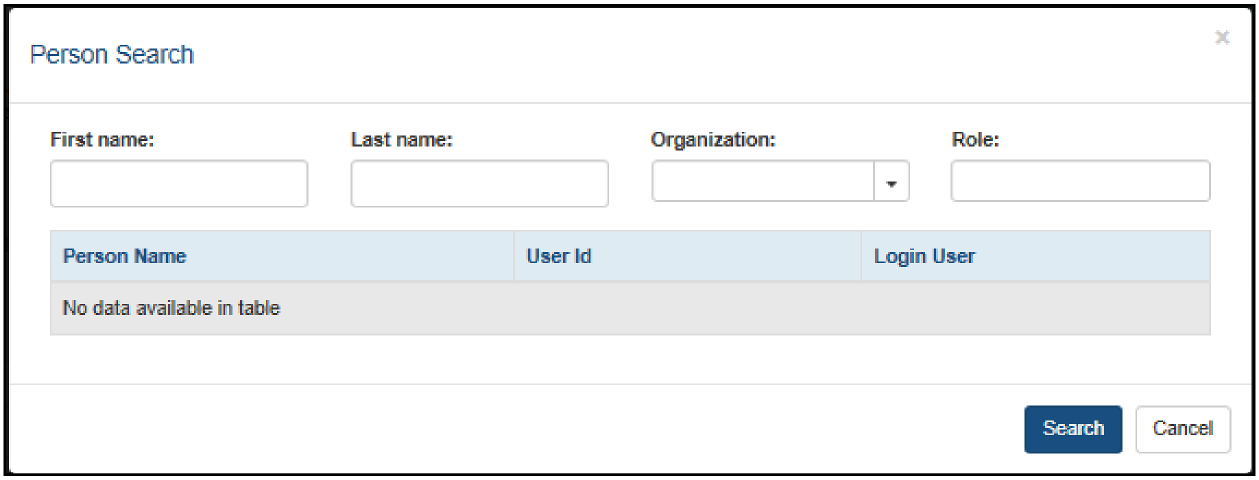
- **Participating IC** — Click to select from drop-down menu.
- **CFDA Number(s) for Participation** — If your organization has a CFDA number, click to select it from the drop-down menu.
- **Contacts:** In these three fields, click to select one or more contacts from a pop-up Person Search screen, as shown below.
  - **Scientific/Research Contacts**
  - **Financial/Grants Management Contacts**
  - **Peer Review Contacts**

4. When you're finished entering information, click **Save** or **Save and Close** to save your changes.

5.12.0.1 Notes:

- You can only add a shared interest record if there is a Shared Interest task currently *In Progress* for the FOA.
- Each IC can add only one shared interest record to a FOA. But FOAM admins for the IC can make repeated changes to this record as needed to accurately express the nature of their IC's interest.
- When a new FOA becomes available, FOAM sends an email notification to the other FOAM-using ICs so those organizations can decide whether to participate. This email has the subject: "FOA available for Shared Interest," and in the body of the email there is a link on the FON: Click the link to go to this tab and add a shared interest record.
- When ICs adds themselves as participating organizations in the Shared Interest tab, the FOAM Admins (Guide Liaisons) of the FOA's Organization (primary IC) get e-mail notifications.

Pop-up Person Search screen:



Editing your IC's shared interest record

If your IC has already created a record for this FOA, it will be listed in this screen.

Use the tools in the Actions column to edit the record: 

- Click the pencil icon to open the record for editing: See **Working in this screen** above for instructions.
- Or click the trashcan icon to delete the record. (Note: Shared Interest record can only be deleted if a Shared Interest task is currently *In Progress* on the FOA)

5.13 Task List tab

Task Lists (also called timelines) are ordered workflows of the tasks required to build the FOA.

Click the **Task List** tab in the FOA screen to create and manage task lists for the FOA:

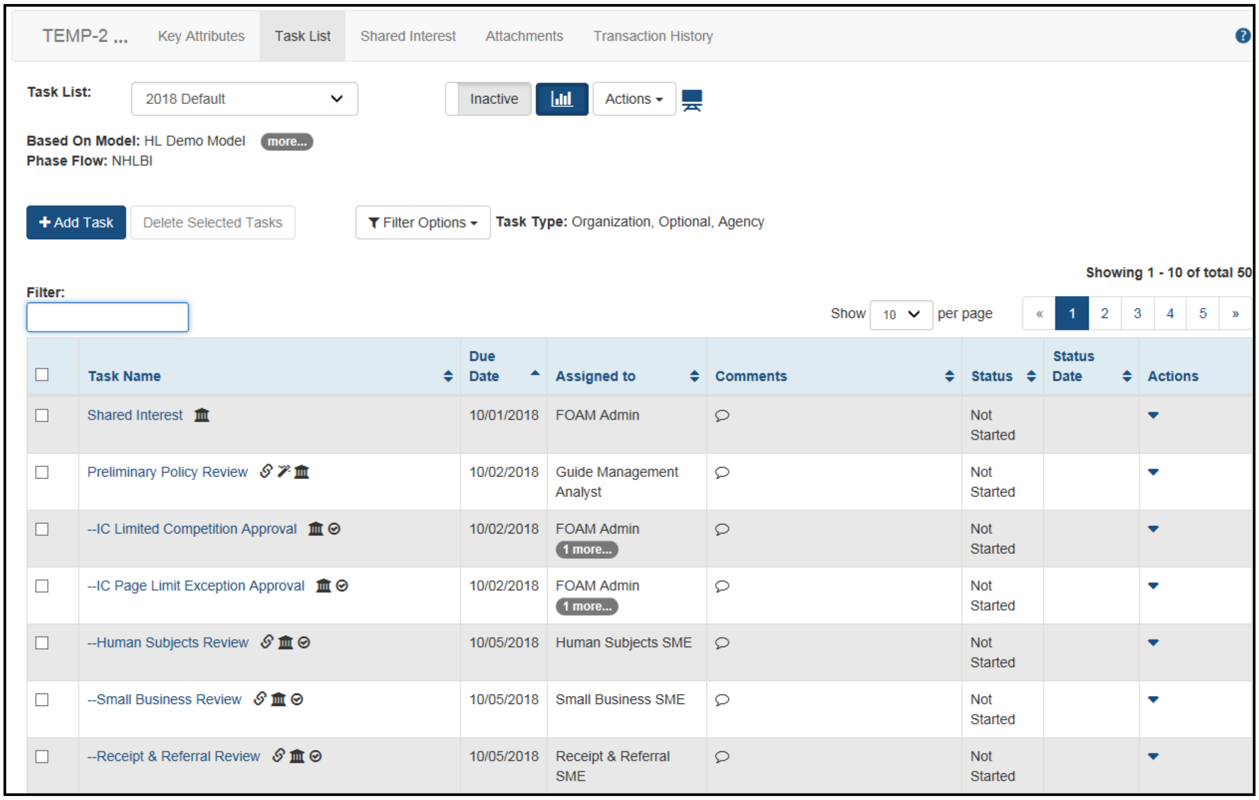
- If the FOA has an existing task list, clicking the **Task List** tab opens the Task List screen, as shown below.

- If the FOA does not yet have a task list, clicking the **Task List** tab opens the Create Task List screen instead.

Use the *Task List* screen to create and manage FOA task lists.

You can create multiple versions of a task list to consider different timeline options for developing the FOA or to compare a reference version of the timeline to the actual conditions. The task list that is currently being used to track the FOA development process is called the “active” task list.

See below for instructions on working with task lists.



Working with the Task List

Click the **Task List** drop-down menu to select which task list to display. If an active task list exists, it is selected by default.

The **Active** button 

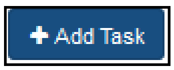
is present on active task lists, and the **Inactive** button 

is present on inactive tasks list. Use these buttons to toggle the active/inactive status of the task list:

- Click the **Inactive** button to make an inactive task list active: that is, to make it the official task list in use now to guide the FOA development process.
- Click the **Active** button to deactivate an active list. Note: You cannot deactivate a task list that has an agency task in progress.

- **Note**: Once the task list becomes active, work can be performed on its tasks and the first mandatory task on the list is set to *In Progress*.
- **Note**: If another task list was active, when a new task list becomes active, the previous task list is set to inactive and all its tasks are set to *Not Started*.

Click the **graph** button  to open a graph view showing the progress of the tasks in this task list. (**Note**: Only available if the task list includes at least one milestone task)

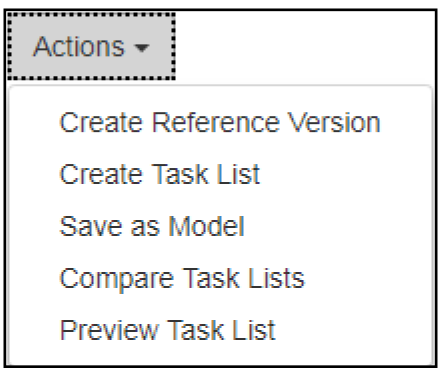
Click **Add Task** 

to open the Task Detail screen and add a new task to the task list.

To delete one or more tasks, use the checkboxes at the left to select the tasks, then click **Delete Selected Tasks**: 

.

Click the **Actions** button to select one of these actions in the Actions menu:



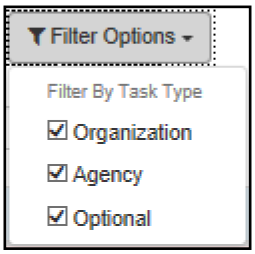
NOTE: The actions available in this menu depend on your user role and the status of the task list. Some or all of the following actions may be available:

- **Create Reference Version** — Click to create a reference version (a snapshot) of the active task list to use for auditing purposes. (**Note**: This action only available to the admin user)
- **Create Task List** — Click to generate a new task list. (**Note**: This action only available to admin users)
- **Save as model** — Click to save the task list you're viewing as a model to use when creating future task lists with the **Create Task List** action. (Note: This action only available to admin users). See Save as Model for information on creating a new task list based on a model.
- **Compare Task Lists** — Click to select two task lists to compare. (**Note**: only available if more than one version of the task list exists)

- **Preview Task List** — Click to generate a detailed overview of all tasks in the list.
- **Sub-Assignment** — Users who have assignment privileges on a task can select this action to add a sub-assignment to the task. Use sub assignments on tasks that are assigned by role to distribute them among the users in your organization.
  To create a sub-assignment, click this action and then select specific users from a pop-up window. (FOAM presents you with a list of users in your organization who have one of the roles required by the task.)

5.13.0.1 Filter and sort

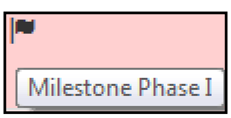
- Open the *Filter Options* menu to select the task types you want to see, as shown here:

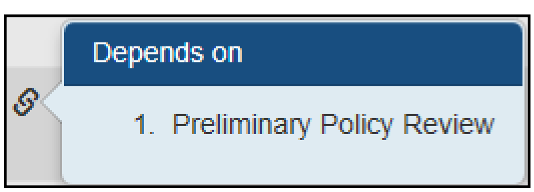
  

  Note: The *Filter Options* menu is not available for GrantSolutions users.
- Or type text in the *Filter* box to see only tasks that have the filter text in some field.
- Click the arrows at the top of the columns to sort the task grid by that property.

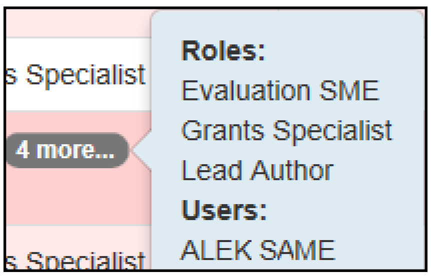
Working with individual tasks

You can perform the following actions on the tasks in the task grid:

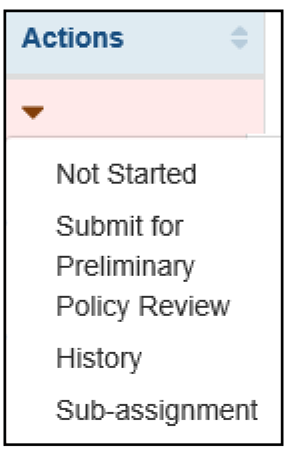
- Click the task name to view or edit the task in the *Task Detail* screen.
- The flag icon indicates milestone tasks. Roll over the icon to see which task phase it's in, as shown here: 

- The link icon  indicates dependent tasks. Roll over it to see the task this task depends on, as shown here: 

- Click the comment icon to add a comment in the Task Comments screen. (**Note:** When you add a comment on a task, the task assignee receives a notification.)
- Other icons identify optional tasks: , agency tasks: , and tasks set to autostart when the task they're dependent on is completed:
- The *Assigned to* column lists the task assignee. If there's more than one assigned person or role, a bubble in the field tells you how many. Roll over it to see them, as shown here:



- Select from the following actions in the **Actions** menu at the right side of the grid, shown here:



NOTE: The actions available for a task depend on your user role and the current task status. Some or all of the following actions may be available for a given task:

- **Not Started** — Sets the task status to Not Started. **Note**: only available to FOAM Admins.
- **Start progress** — Sets the task (set the task status to *In Progress*). **Note**: Only FOAM Admins can start a task.
- **Complete** — Sets the task status to Completed. **Note**: only available to FOAM Admins.

- **Submit for Policy Review** — Submit to OEP for policy review. **Note**: only available to FOAM Admins.
- **Delete task** — Deletes the task. **Note**: not available for in-progress, completed, or expired tasks.
- **History** — Click to open the Task History screen.

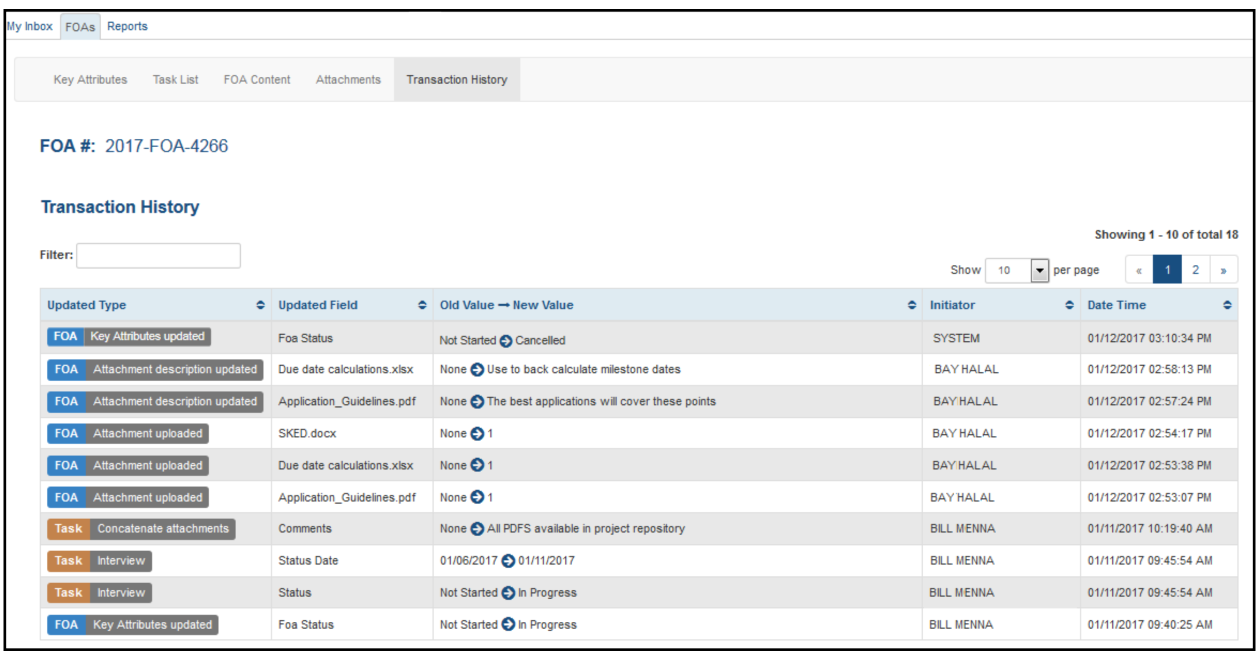
NOTE: For "Agency" task types, users with the Agency Admin or eRA FOAM Admin user role can act on the task (Start it, set it to Not Started, Delete it or Complete it) even if the task is not assigned to them.

5.14 Transaction History

This screen lists all transactions that have been performed on the FOA, such as content updates and FOA development process events (timeline scheduling and task completion).

Note: The transactions you can see in this screen depend on your user role. So actions that are outside the scope of your role may not be visible.

Filtering: Enter text in the Filter field to only show transactions that have the filter text in at least one fields. For example, enter "activ" to see all changes to Activity Code or all tasks that moved to Active status.



This screen contains the following fields:

Update type — The type of update and to which part of the FOA (key attribute, task, task list) and the action that was performed on it.

Updated field — Name of the field that was updated

Old Value --> New Value — The old and new value of the field that was updated

Initiator — The person who performed the transaction

Date Time — The date the transaction occurred

6 Reports

the *Reports* screen opens when you click *Reports* in the menu bar, as shown below.

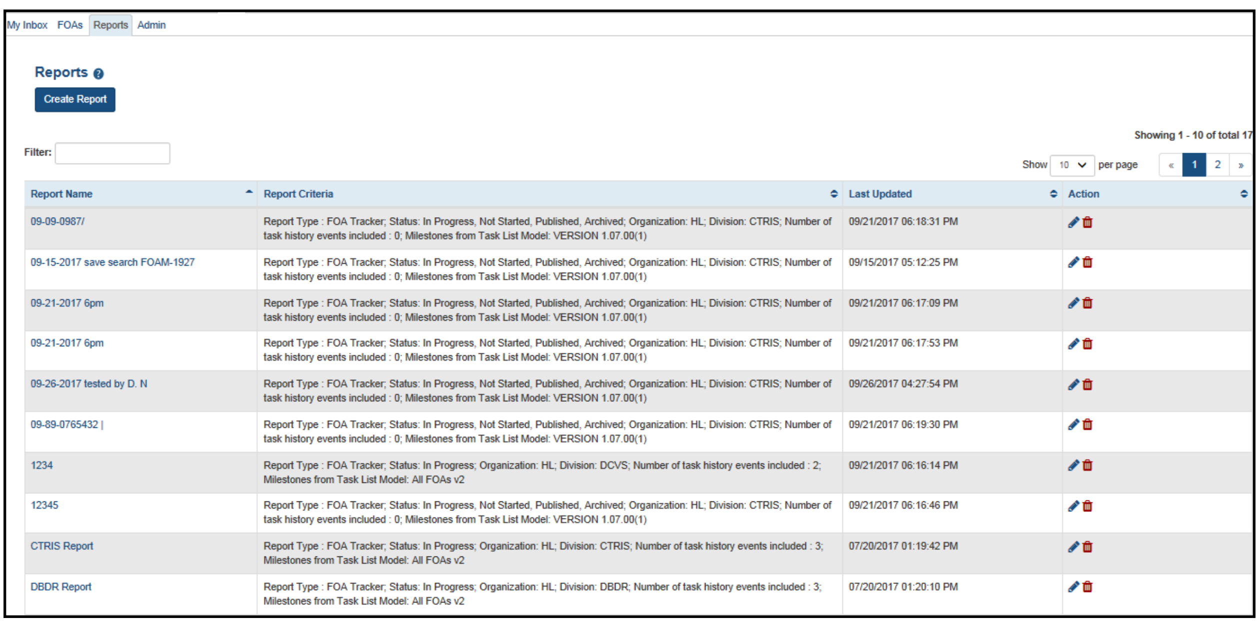
Use this screen to view, create and manage reports on the FOAs that have been created or are in development for your IC.

You can view saved reports, create new reports, delete existing reports, and edit report names.

Actions:

- **Create Report** — Click the *Create Report* button to create a new report in the Report Parameters screen.
- **View Report** — Click a *Report Name* to view the report in the Report Output screen.
- **Other Actions** — Click the icons in the *Actions* column to choose these actions:

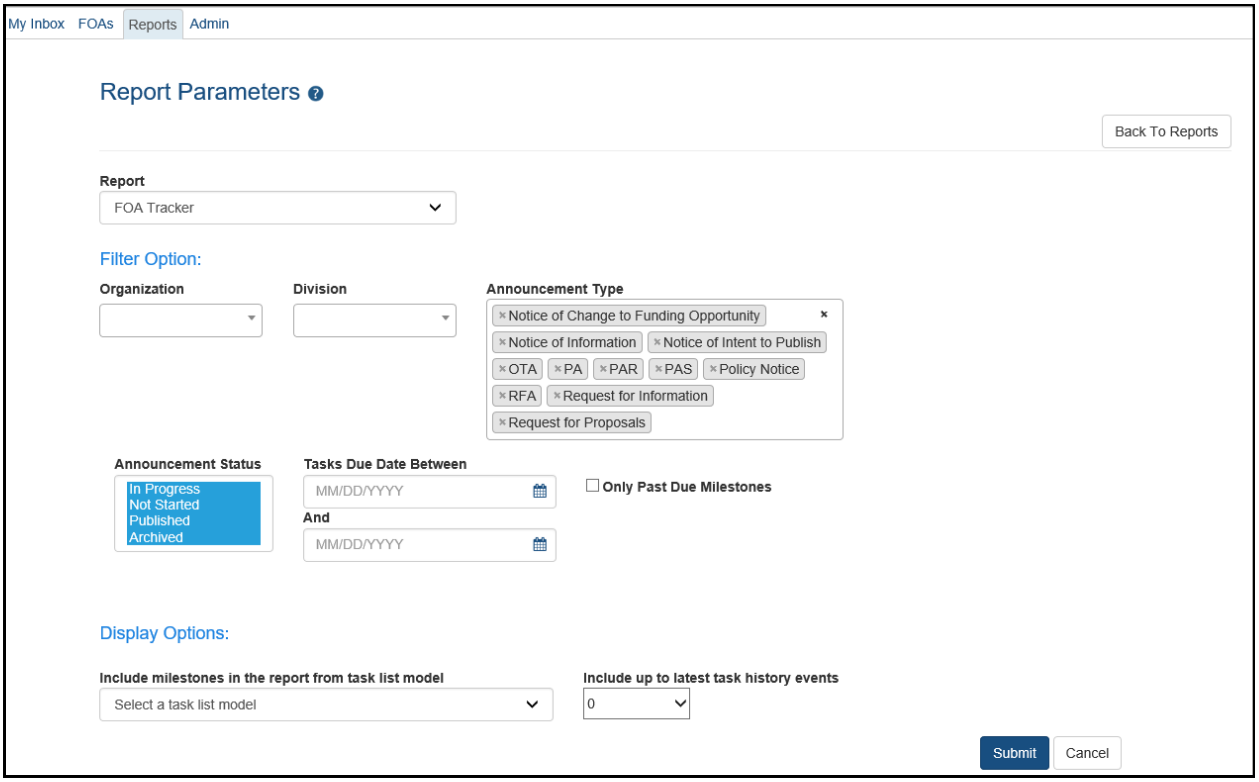
  - Click the pen icon to edit the report name
  - Click the trash icon to delete the report.



6.1 Report Parameters

When you click **Create Report** in the Reports screen, the *Report Parameters* screen opens, as shown here:

Use this screen to configure and generate reports.



To create a report, select one of the following report types from the **Report** drop-down menu and set report parameters as directed:

FOA Tracker report

This report presents FOAs along with information regarding completion of milestones tasks for each FOA (due date, actual completion date, overdue days).

1. To create it select **FOA Tracker** from the Report drop-down menu.

2. If you wish, use the following filter fields to limit the report results:

- **IC** — Choose from the drop-down menu to report only FOAs from a selected IC.
- **Division** — Choose from the drop-down menu to report only FOAs with from a selected division within the IC.
- **Announcement Type** — Choose from the drop-down menu to report only certain announcement types (you can select up to 10 types)..
- **Announcement Status** — Choose from the drop-down menu to report only anouncements with a selected status.
- **Task due date between** — Enter beginning and end dates to report only FOAs that have a task due within a certain time period.

- **Only past due milestones** — Click to report only FOAs that have a past due milestone.

3. Set the following display options:

- **Include milestones in the report from task list model** — the FOA Tracker report requires you to use a task list model which includes milestone tasks: Use this drop-down menu to select a task list model. See Save as Model more information on task list models.
- **Include totals** — Includes the totals at the end of the report: total number of FOAs, % of published FOAs, % of unpublished FOAs.
- **Include latest task history** — Include latest task history for each FOA on the report.

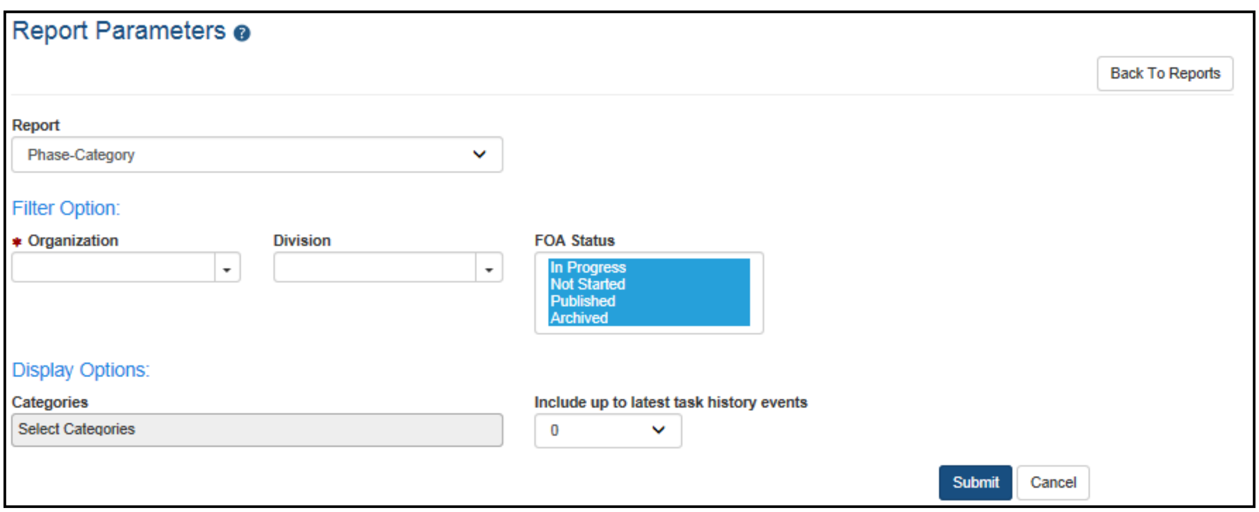
4. When you finish configuring the parameters, click **Submit** to generate the report and open it in the Report Output screen.

Phase-Category report

This report lists FOAs of the category you select.

1. To create this report, select **Phase Category** from the Report drop-down menu.

   When you do, the screen presents slightly different filter and display options, as shown here:



2. If you wish, use the following filter fields to limit the report results:

- **IC** — Choose from the drop-down menu to report only FOAs from a selected IC.
- **Division** — Choose from the drop-down menu to report only FOAs with from a selected division within the IC.

- **FOA Status** — Choose from the drop-down menu to report only FOAs with a selected status.

3. Set the following display options:

- **Categories** — Select the FOA categories to include in the report.
- **Include up to latest task history events** — Select the maximum number of task history events to display for each FOA in the report.

4. When you finish configuring the parameters, click **Submit** to generate the report and open it in the Report Output screen.

HHS Forecast Export report

This report lists all published *Notice of Intent to Publish* FOAs, which together constitute a forecast of the agency's upcoming grant activity.

FOAM Agency Admins and eRA FOAM Admins can run this report and generate a Forecast export file to comply with grants.gov agreement.

1. To generate it, select **HHS Forecast Export** from the Report drop-down menu.

When you select HHS Forecast Export, the **Generate Forecast Export Report** button appears in the screen, as shown here:

2. Click **Generate Forecast Export Report** to generate the report in Excel format.

3. When you click this button, a dialog opens, giving you the option to open or save the Excel file.

For information on the contents of the report file, see Report Output.

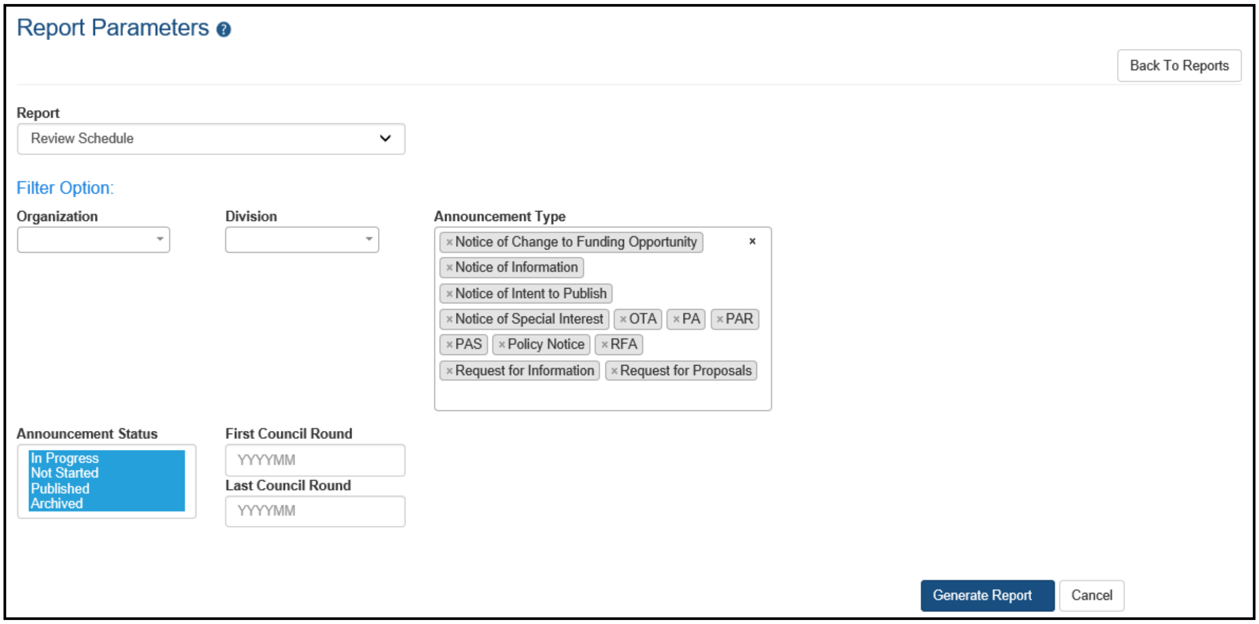
Review Schedule report

This report shows when FOAs are due for review, listing the key dates and personnel for each FOA.

FOAM Admins can run this report.

1. To generate the report, select **Review Schedule** from the Report drop-down menu.

   When you select Review Schedule, the **Generate Report** button appears in the screen, as shown here:



2. If you wish, select properties in the filter fields to limit the report results, then click **Generate Report** to generate the report in PDF format.

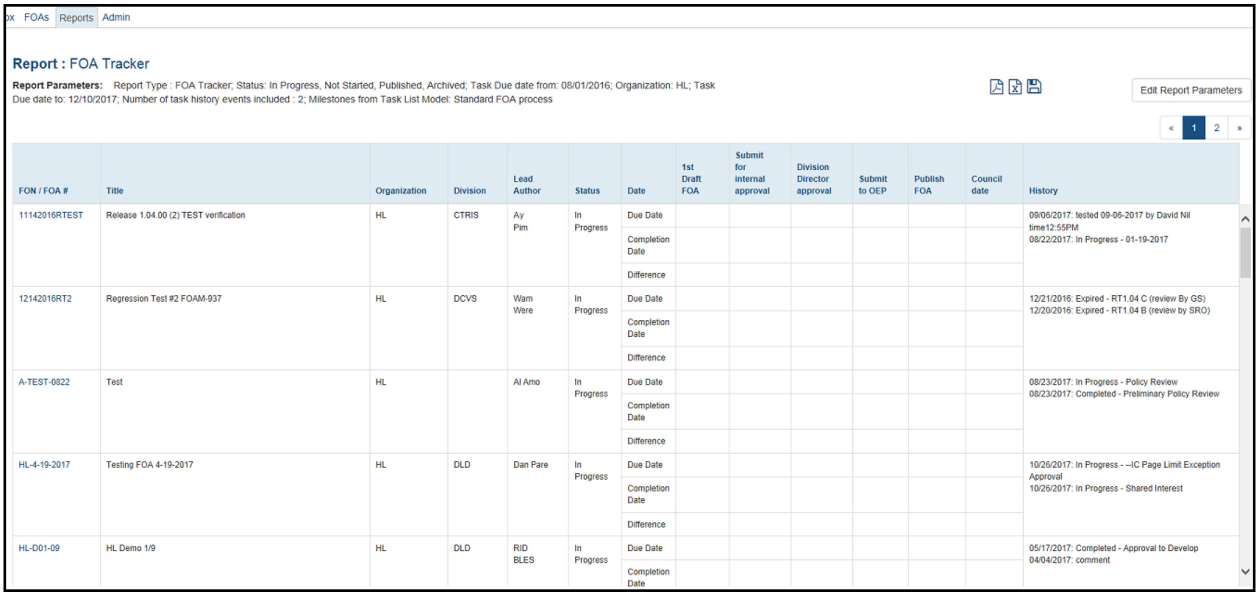
3. When you click this button, a dialog opens, giving you the option to open or save the PDF file.

For information on the contents of the report file, see Report Output.

6.2 Report Output

This screen shows the output of the reports you configure in the Report Parameters screen.

FOA Tracker report



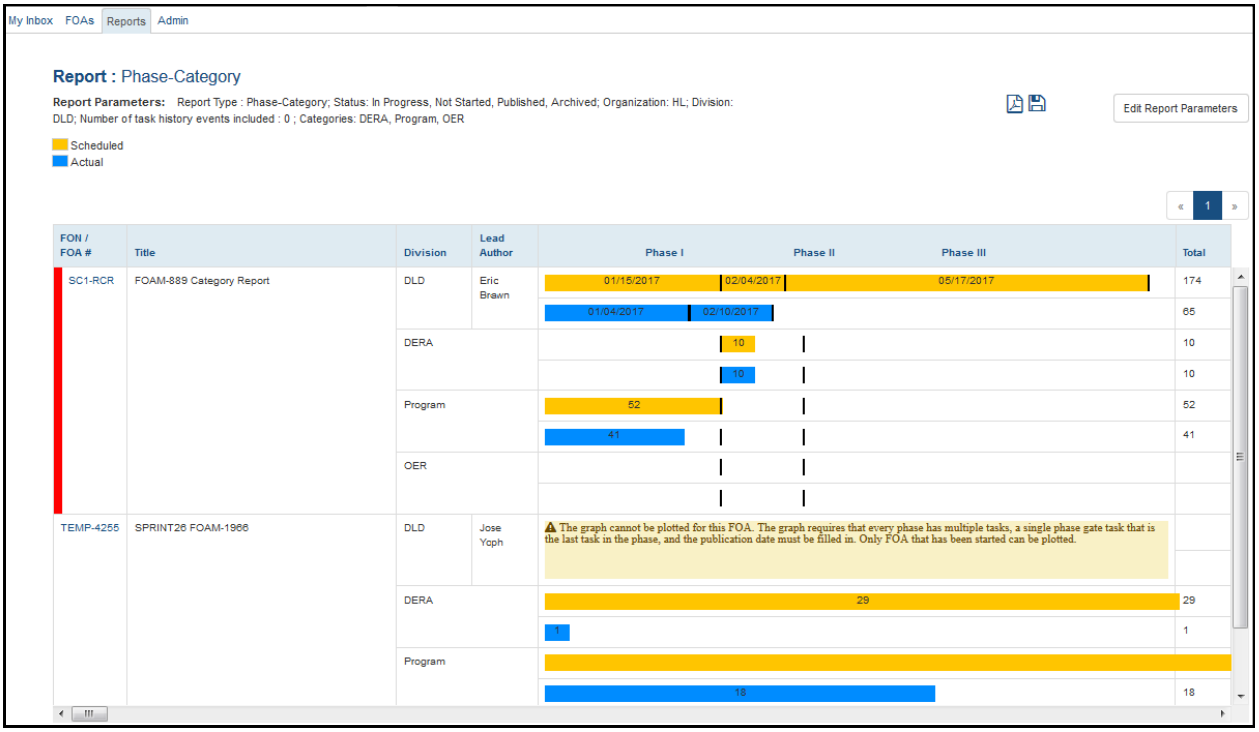
Actions

Use the controls above the grid

to perform the following actions:

- **Export:** Click the Acrobat or Excel icon to output a copy of the report in PDF or Excel format.
- **Save:** Click the disk icon to save the report for later viewing in the Reports screen.
- **Edit:** Click **Edit Report Parameters** to return to the *Report Parameters* screen and adjust the report parameters

Phase-Category report



Actions

Use the controls above the grid

to perform the following actions:

- **Export:** Click the Acrobat or Excel icon to output a copy of the report in PDF or Excel format.
- **Save:** FOAM Admins only: Click the disk icon to save the report for later viewing in the Reports screen.
- **Edit:** Click **Edit Report Parameters** to return to the *Report Parameters* screen and adjust the report parameters

HHS Forecast Export report

When you select **Generate Forecast Export Report** in the Report Parameters screen, FOAM generates the report in Excel format and opens a dialog so in which you can choose to open or save the report.

The forecastExport.xlsx file includes the following columns:

- Final #
- Earliest start date year
- Title
- Funding Activity Category Code
- Funding Instrument Type Code(s)
- Expected Number of Awards
- Primary CFDA Numbers
- Cost Sharing
- Program Funding Type
- New opportunity
- Estimated Total Funding
- Estimated Award Ceiling
- Estimated Award Floor
- Post Date of FOA
- Estimated Due Date
- Estimated Start Date
- Estimated Award Date
- Eligibility Category Code
- Additional Eligibility Information
- Purpose/ Executive Summary
- Scientific/Research Contact - Name
- Scientific/Research Contact - Email
- Scientific/Research Contact - Phone
- Issuing Sub OpDiv
- Issuing OpDiv
- Grants.gov Post Date
- ARRA (Recovery Act)
- ACA (Affordable Care Act)
- Grants.gov URL
- Grants.gov Archive Date
- Item Type
- Path

Review Schedule report

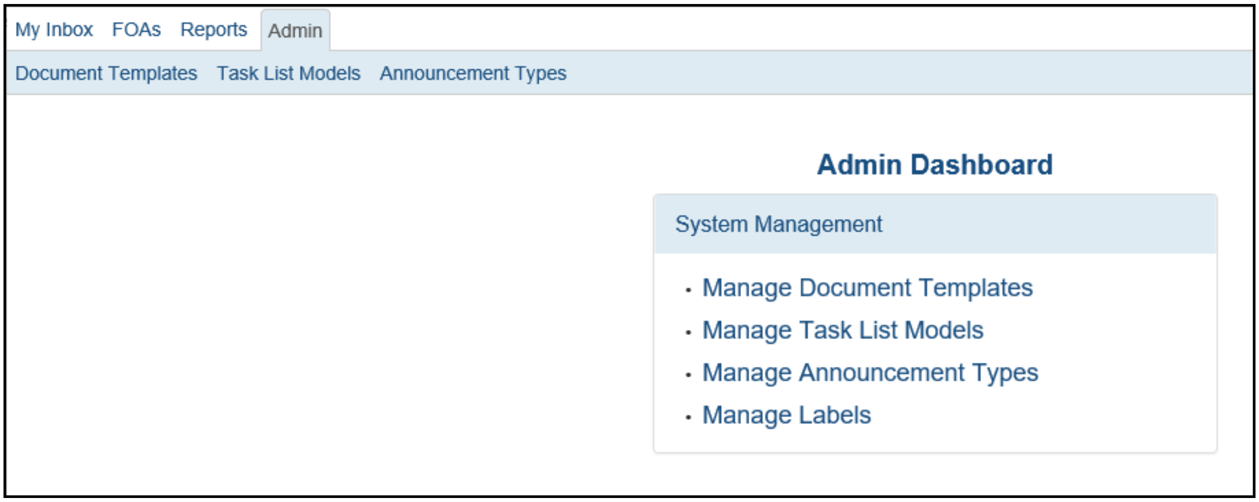
When you select **Generate Review Schedule Report** in the Report Parameters screen, FOAM generates the report in PDF format and opens a dialog so in which you can choose to open or save the report.

The ReviewScheduleReport.pdf file includes the following columns grouped by Council round:

- FON (FOA #)
- Title
- Lead Author
- SRO
- Grants Specialist
- New Receipt date
- R/R/R Receipt date
- AIDS Receipt date

7 Admin Dashboard

The Admin Dashboard opens when you click the Admin tab, as shown here:



Click the links to perform these system management functions:

- Manage Document Templates

  View and manage the document templates used by your organization to format FOAs.

- Manage Task List Models

  View and manage the task list models used by your organization to create standardized FOA task lists.

- Manage Announcement Types

  View and manage the Announcement Types available in your organization.

- Manage Labels

  View and manage the labels that can be applied to announcements in your organization.

7.1 *Manage Document Templates*

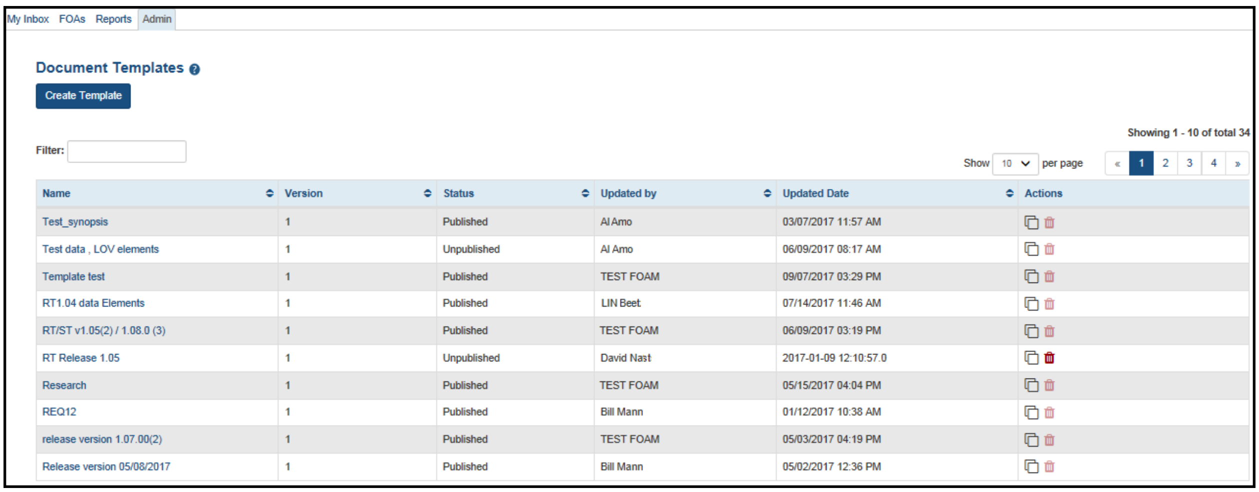
The *Document Templates* screen, shown below, opens when you click **Manage Document Templates** in the Admin Dashboard.

This screen lists all the document templates available for your organization.

NOTE: This screen is only available to users with the FOAM Template Editor or FOAM GS Admin user role.

Actions

- Click **Create Template** to create a new template.
- Click a template name to view or edit its Key Attributes.
- Click the trash icon to delete a template
- Click the copy icon to save a new version of the template or save a copy of it (i.e., clone it). See Clone Document Template.


My Inbox FOAs Reports Admin

Document Templates

Create Template

Filter:

Showing 1 - 10 of total 34

Show 10 per page « 1 2 3 4 »

Name	Version	Status	Updated by	Updated Date	Actions
Test_synopsis	1	Published	Al Amo	03/07/2017 11:57 AM	
Test data , LOV elements	1	Unpublished	Al Amo	06/09/2017 08:17 AM	
Template test	1	Published	TEST FOAM	09/07/2017 03:29 PM	
RT1.04 data Elements	1	Published	LIN Beet	07/14/2017 11:46 AM	
RT/ST v1.05(2) / 1.08.0 (3)	1	Published	TEST FOAM	06/09/2017 03:19 PM	
RT Release 1.05	1	Unpublished	David Nast	2017-01-09 12:10:57.0	
Research	1	Published	TEST FOAM	05/15/2017 04:04 PM	
REQ12	1	Published	Bill Mann	01/12/2017 10:38 AM	
release version 1.07.00(2)	1	Published	TEST FOAM	05/03/2017 04:19 PM	
Release version 05/08/2017	1	Published	Bill Mann	05/02/2017 12:36 PM	

This screen contains the following columns:

- **Name** — Click to view or edit a template's Key Attributes.
- **Version** — Current version of the template
- **Status** — Publishing status of the template
- **Last updated by** — The user who last updated the template
- **Last update** — Date and time of the last update
- **Actions** — Click the trash icon to delete the template.

7.2 Manage Task List Models

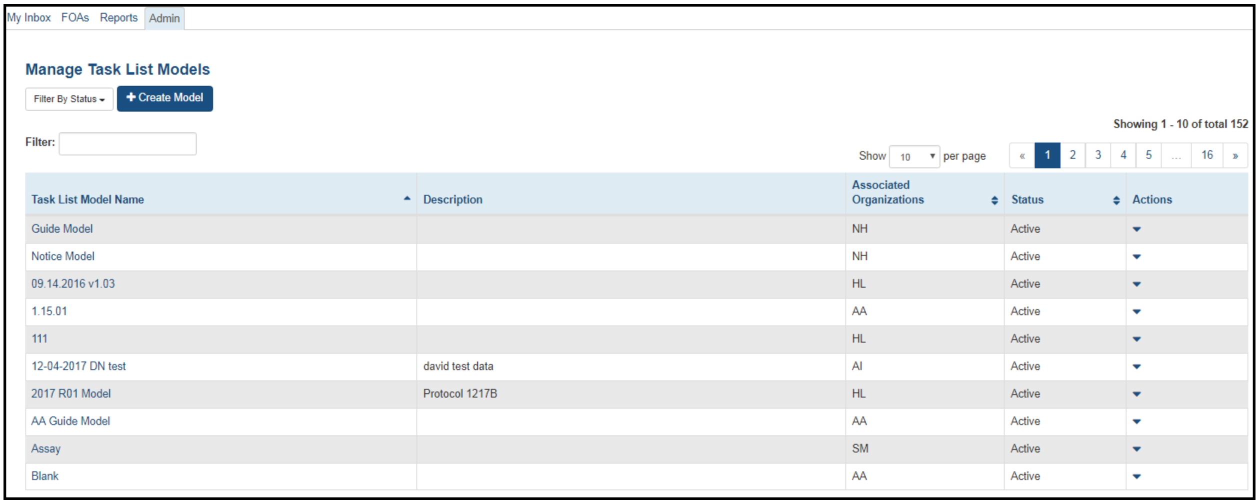
Task list models are templates that are used to create standardized FOA task lists.

The Manage Task List Models screen opens when you click *Manage Task List Models* in the Admin tab, as shown below.

FOAM Admins can use this screen to view, create and manage task list models for their ICs.

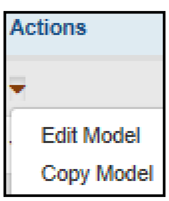
FOAM Agency Admins can do the same at the agency level.

If you wish, click the **Filter by Status** button to filter the models by Active/Inactive status.



Actions

- Click **Create Model** to create a new model in the in the [Manage Task List Model](#) screen.
- Click a model name edit a model in the [Manage Task List Model](#) screen.
- Or click the down arrow to select one of these actions from the *Actions* drop-down menu:



  - **Edit Model** — Edit model in the [Manage Task List Model](#) screen.

Manage Task List Model

When you click the **Create Model** button or the **edit** action for a task list model in the *[Manage Task List Models](#)* tab, this screen opens.

Use it to create and edit the task list models that your IC uses as templates to create FOA task lists.

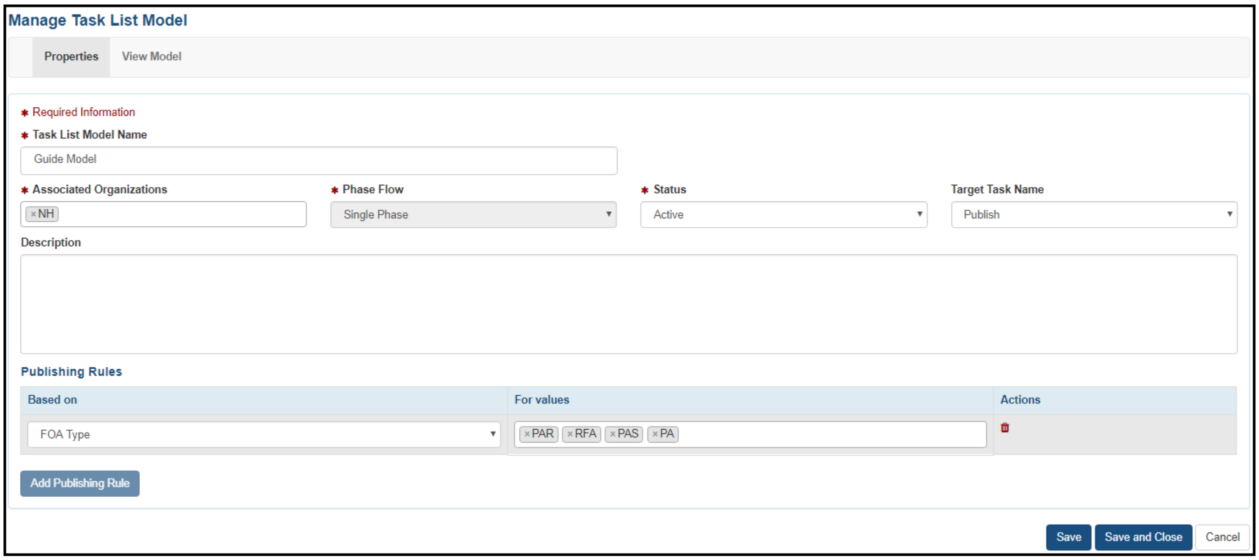
The screen contains these two tabs:

7.2.0.1 Properties tab

In this tab FOAM Admins can enter or edit the Model Name and Published/Unpublished status of the model.

FOAM Agency Admins and eRA FOAM Admins can do the same, and can also select the organizations (and the phase flows within those organizations) that can use the model.

Edit the fields as needed and click **Save**.



Adding Publishing Rules

Use this section to define automatic publishing rules that govern whether the task list model can be associated with a given FOA, based on the FOA's key attributes.

Follow these steps to create a publishing rule:

1. Click **Add Publishing Rule** to open the configuration tool, as shown here:

2. Set these two attributes:

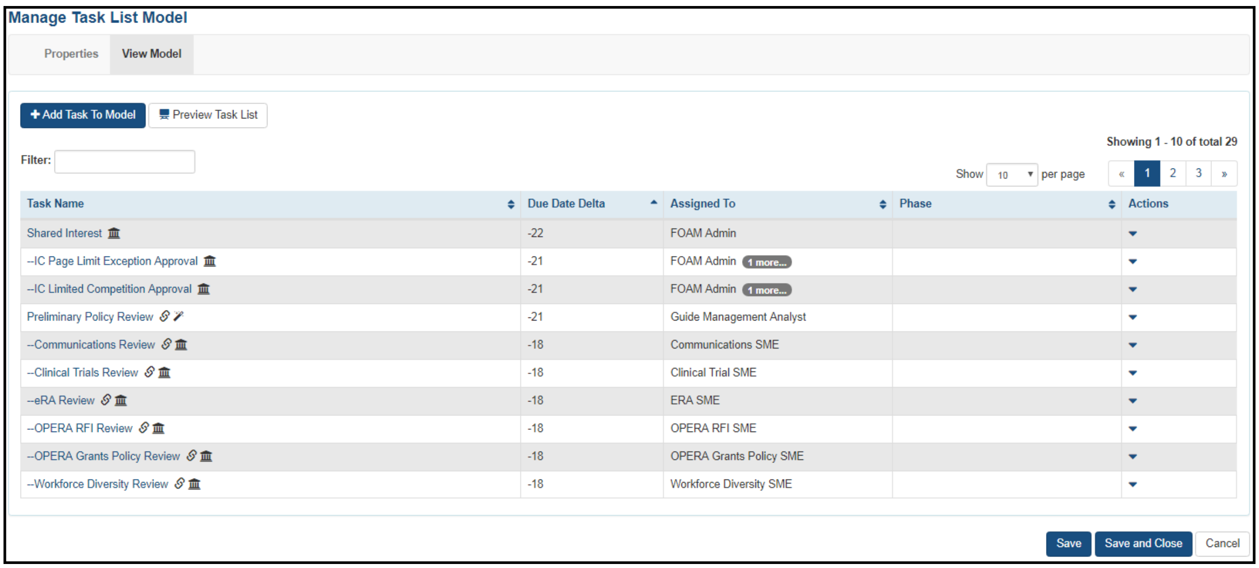
- ◦ **Based on** — Select an FOA attribute, such as Activity Code or FOA Type.
- ◦ **For Values** — Enter one or more possible values for this attribute: The template will only be available for use with FOAs that have one of these values.

3. To add another rule, click **Add Publishing Rule** again to add another row to the grid, then configure it as above.
   Note: You cannot create more than two publishing rules to a template.

NOTE: ACF and CDC users can only add one publishing rule to a template, and the only available **Based On** attribute is FOA Type.

7.2.0.2 Task List Model tab

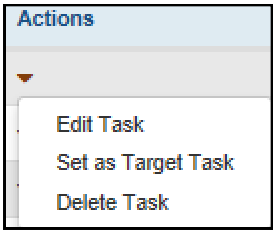
In this tab FOAM Admins can add and edit tasks in the task list model.



Actions

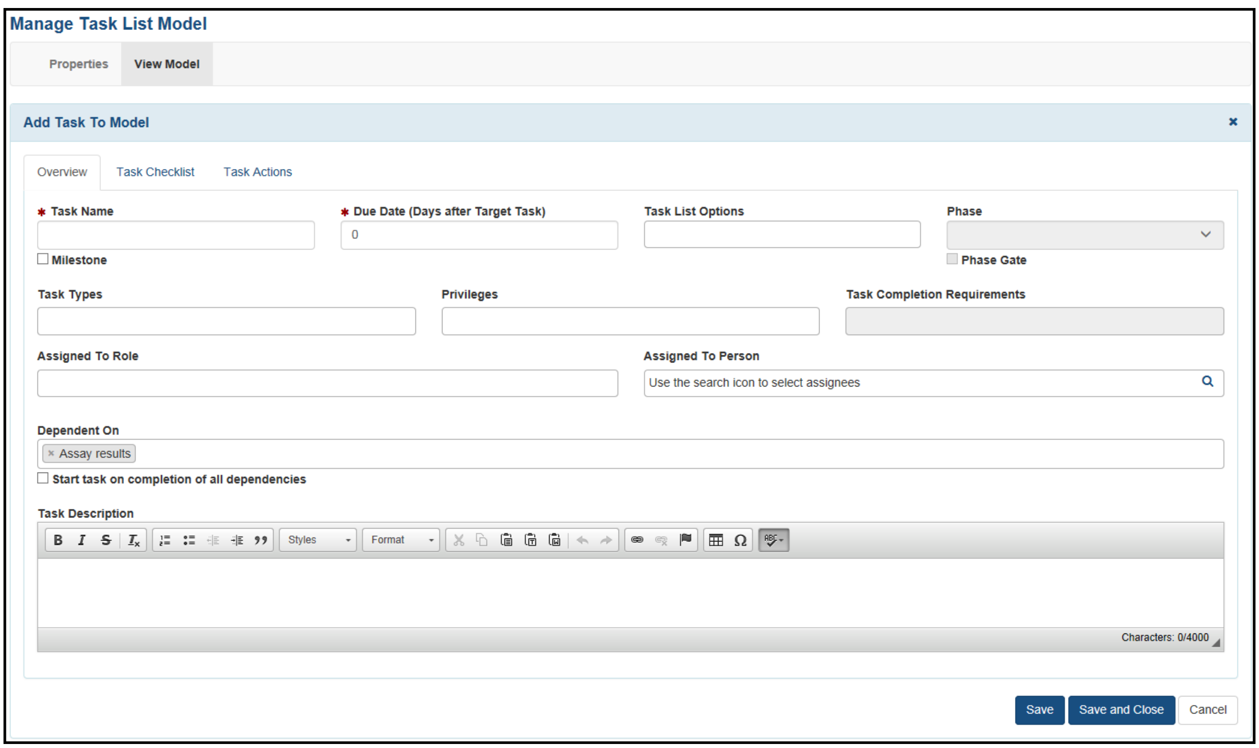
- Click the Task Name to edit the task in the See *Task tab* below for instructions.
- Click the **Add Task to Model** button to open a *Task tab* and define a new task. See *Task tab* below for instructions.

- Or click the down arrow to select one of these actions from the *Actions* drop-down menu:



  - **Edit Task** — Edit the task in the *Task Tab*. See below for instructions.
  - **Set as Target Task** — Use this task as the baseline to calculate the due dates for all the other tasks in the list.
  - **Delete Task** — delete task from the model.

7.2.0.3 Task tab



The Task Tab opens to the Overview, as shown above.

Configure the task properties in the Overview as described below, and click on these other task detail tabs to define additional task properties:

See also these other Task Detail tabs:

- Task Checklist tab
- Task Actions tab

Use these fields in the Overview tab to define task properties:

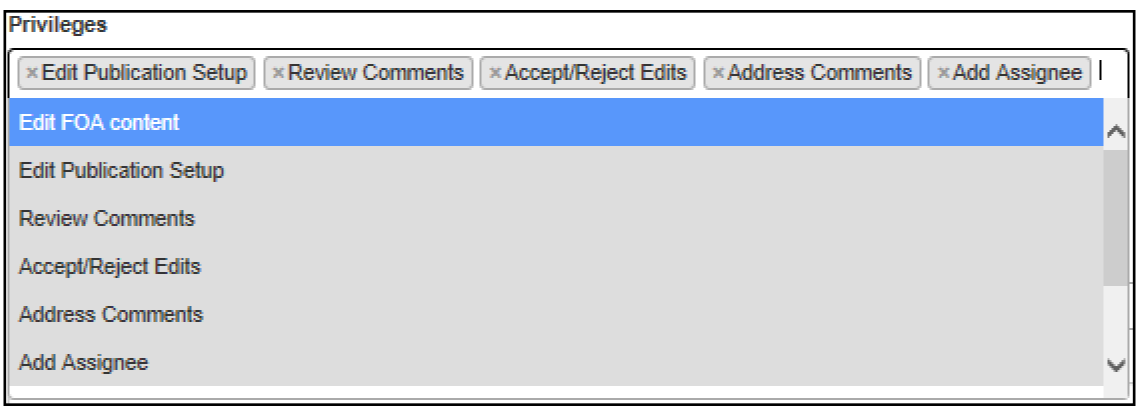
- **Task Name** — Enter the name of the task
- **Due Date** — Enter the number of days that the due date for this task should be after the due date of the model's target task. (Enter a negative number if the due date for this task should be before the model's target task.)
- **Phase** — Select the phase of the task.
- **Milestone** — Check this box if the task is a milestone and should be displayed on the graph and in reports.
- **Task List Options** — Select one or more of these options for handling due dates:
  - *Expire on due date* — Make task expire automatically if it is not completed by the due date.
  - *Update dependent (subsequent) due dates* — If this task's due date changes, adjust the due dates of tasks that are dependent on it (subsequent tasks).
  - *Update dependent-on (previous) due dates* — If this task's due date changes, adjust the due dates of tasks that it is dependent on (previous tasks).
- **Phase Gate** — Check this box if the task is a phase gate (that is, the task that completes the selected phase and kicks off the next phase).
- **Task Types** — Click to open the drop-down menu and assign one or more task types. The following task types are available:
  - *Agency* — Designates OEP actions. Note: For *Agency* tasks, users with the Agency Admin or eRA FOAM Admin user role can act on the task (Start it, set it to Not Started, Delete it or Complete it) even if the task is not assigned to them. And IC users cannot access these tasks at all.
  - *Optional* — Tasks that may not need to be executed for the FOA and can be filtered out from a Task List view. Note: Once an optional task is initiated, it is no longer considered optional.
  - *Shared Interest* — When a Shared Interest task is initiated, the Shared Interest tab becomes available for other organizations to add their participation.

- **Privileges** — Use this field to give the assignee privileges for making changes to the task. click to see instructions:

Click the **Privileges** field to open drop-down menu and select one or more of the following privileges:

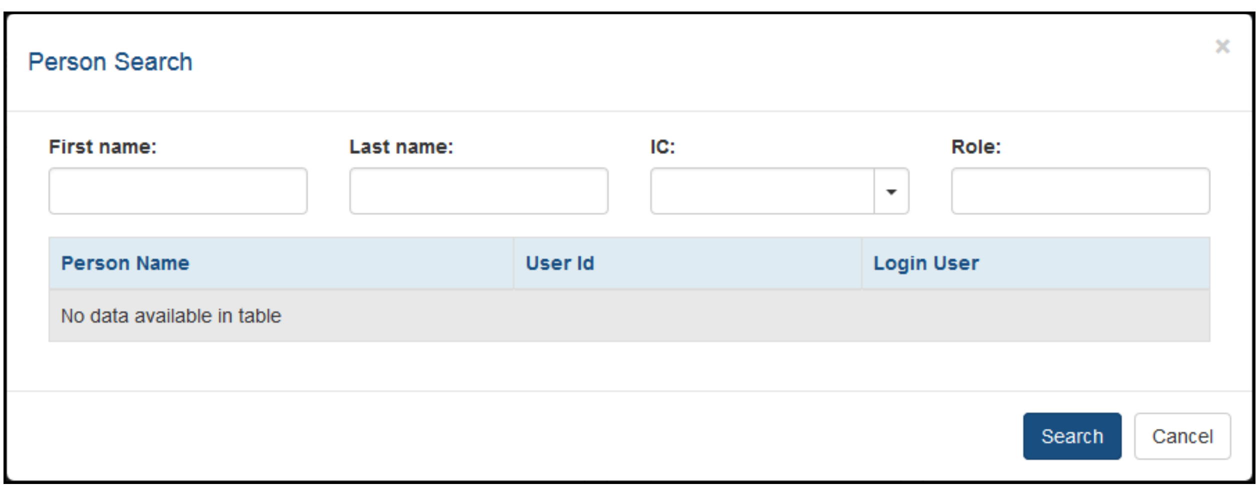
- Edit Key Attributes
- Edit FOA Content
- Edit Publication Setup
- Review Comments
- Accept/Reject Edits
- Address Comments
- Add Next Task Assignee —
- Delete Next Task Assignee
- Publish Forecast Record
- Publish Opportunity
- Review
- Edit Policy Language — Can update policy language data elements (which are otherwise non-editable except by Agency Admin and eRA FOAM Admin).
- Edit Due Date
- Publish to GMM

Click privileges one-by-one to select them and add them to the list, as shown below. You can add as many as you want.



Click on a privilege a second time to remove it from the list.

- **Task CompletionRequirements** — Select validations to perform before the task can be completed:
  When the user tries to mark the task complete, the system issues an error if any of the required items have not been completed.
    - Validate Grants.gov Synopsis
    - Validate Grants.gov Application Package(s)
    - Validate Published Forecast
    - Validate Published Opportunity
    - Validate GMM Publication
    - Validate FOA Content
    - Validate Key Attributes
    - Validate NIH Guide Attributes — For "Notice" FOA types, validate the Key Attributes required for OEP review. For other FOA types, validate all key attributes.
    - Shared Interest Period — This requirement is available if the task includes *Edit FOA Content* privilege.
- **Assigned To**: Who is responsible for completing this task? Use the next two fields to specify: You can assign the task to a specific person and/or to any user who has a given user role.
    - *Assigned to Role* — Select FOA or eRA roles responsible for completing the task.
    - *Assigned to Person* — Select user(s) responsible for completing the task: Click the magnifying glass icon to open a pop-up Person Search window, as shown below. Perform your search and select a person to close the pop-up window.



- **Dependent On** — Use to create task dependencies: Click to open a drop-down menu and select the tasks that must be completed before this task can be started.
  Note: If you make your task dependent on an optional task, the assignee does not have to wait for the optional task to be completed: He or she can start anytime as long as all non-optional tasks have been completed.
- **Start task on completion of dependencies** — check to start the task automatically once all tasks it depends on are completed.

  Category — the category of the task used for reporting.
- **Task Description** — Description of the task. This can be used to provide instructions to the assignee of what needs to be done for this task.

Saving the Task

At any point in this process, you can click the **Save** button to save your changes.

When you are finished configuring the task, click **Save and Close** to save your changes and close the window.

8 Manage Document Templates

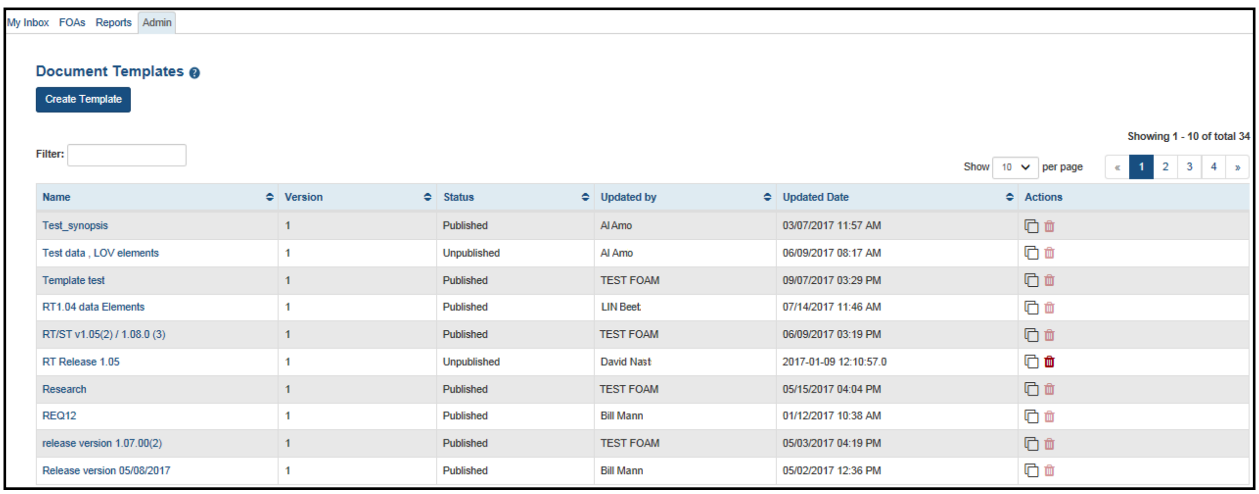
The *Document Templates* screen, shown below, opens when you click **Manage Document Templates** in the Admin Dashboard.

This screen lists all the document templates available for your organization.

NOTE: This screen is only available to users with the FOAM Template Editor or FOAM GS Admin user role.

8.1 Actions

- Click **Create Template** to create a new template.
- Click a template name to view or edit its Key Attributes.
- Click the trash icon to delete a template
- Click the copy icon to save a new version of the template or save a copy of it (i.e., clone it). See Clone Document Template.



This screen contains the following columns:

- **Name** — Click to view or edit a template's Key Attributes.
- **Version** — Current version of the template
- **Status** — Publishing status of the template
- **Last updated by** — The user who last updated the template

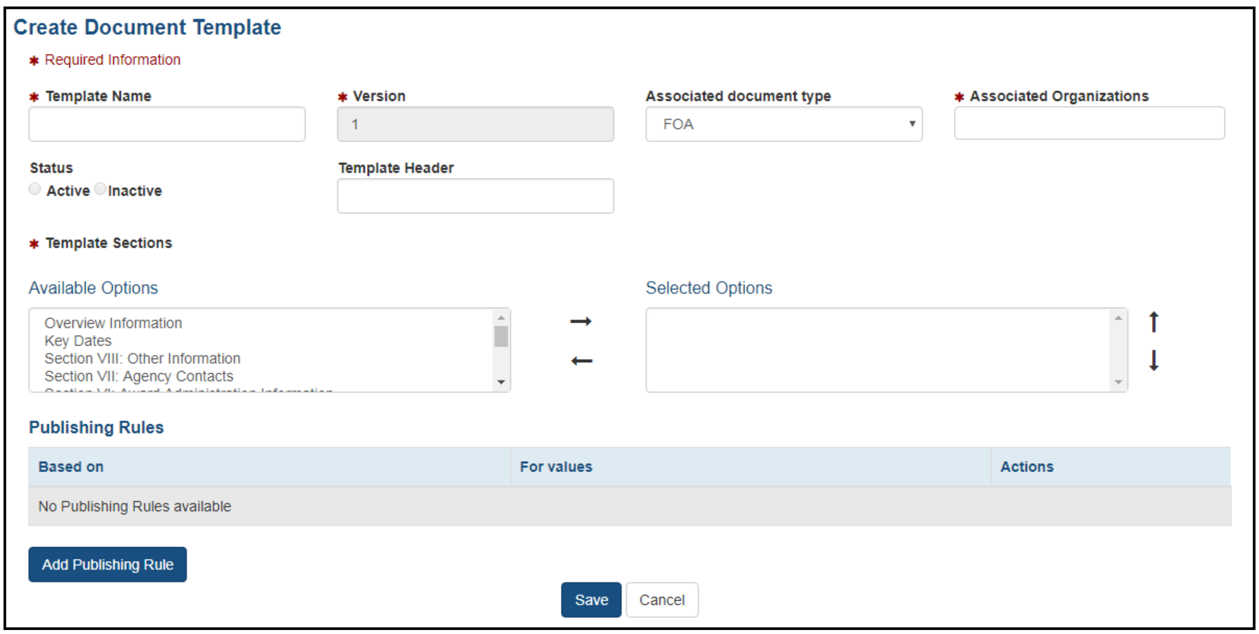
- **Last update** — Date and time of the last update
- **Actions** — Click the trash icon to delete the template.

8.2 Create Document Template

When you click **Create Template** or choose to clone a template in the Document Templates screen, this screen opens.

Use it to create document templates for your IC.

Document templates define which data elements will comprise a document such as an FOA or a Notice and the characteristics of those data elements, such as position and content rules.



Use the fields in this screen to configure these template attributes:

- **Template Name** — Enter a unique name for the template.
- **Version** — Set the current version of the template.
- **Associated Document type** — Select the document types that can be associated with the template.
  Note: For information on the Common Element Library Template, see Common Element Library Template.

  Once such a template is published, you can select elements from the *Common Element Name* drop-down menu, shown here:

- **Associated Organizations** — Select the Organizations that can use the template.
- **Status** — Set the publishing status of the template: Select *Active* if the template is available to be associated with documents, select *Inactive* if it is not available.
- **Template Sections — Use these two panes to choose the named sections you want to include in the template, and then arrange them in the desired order:**

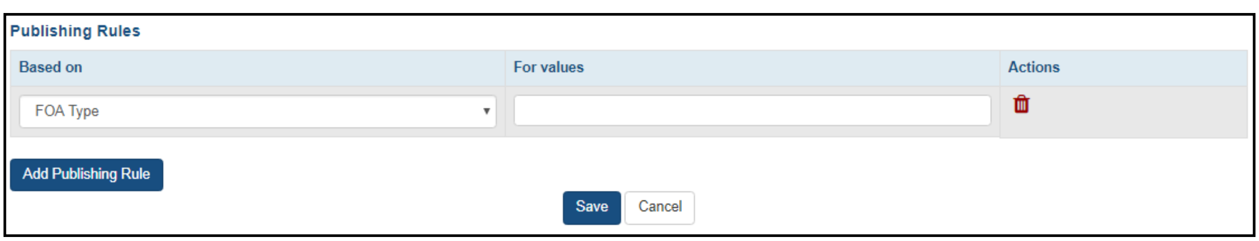
1. Scroll through the *Available Options* pane and click on sections you would like to include in the template, then click the right-facing arrow to move them to the *Selected Options* pane.
   Likewise, to remove sections from the template, click them in the *Selected Options* pane and click the left-facing arrow to move them back to the *Available Options* pane. (But note: You cannot remove a section if it already has a data element associated with it.)
2. Then arrange the template sections in order: Click on sections in the *Selected Options* pane and use the up and down arrows to arrange them in the desired order.

Publishing Rules

Use to define automatic publishing rules that govern whether the template can be associated with a given FOA, based on the FOA's key attributes.

Follow these steps to create a publishing rule:

1. Click **Add Publishing Rule** to open the configuration tool, as shown here:



2. Set these two attributes:

- **Based on** — Select an FOA attribute, such as Activity Code or FOA Type.
- **For Values** — Enter one or more possible values for this attribute: The template will only be available for use with FOAs that have one of these values.

3. To add another rule, click **Add Publishing Rule** again to add another row to the grid, then configure it as above.
   Note: You cannot create more than two publishing rules to a template.

NOTE: ACF and CDC users can only add one publishing rule to a template, and the only available **Based On** attribute is FOA Type.

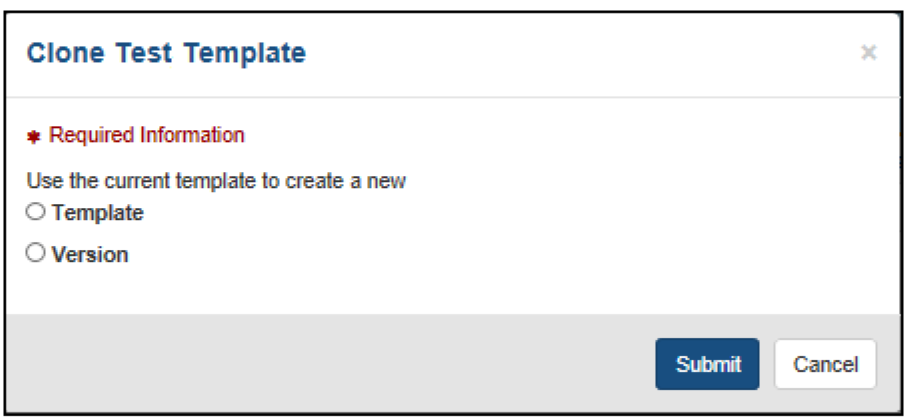
When you finish configuring the template, click **Save** to save it.

Next Steps

When you have finished configuring the attributes, sections and rules of the document template, save the template and, click **Data Elements** in the top nav bar to proceed to the Data Element Detail screen to add data elements to the template.

8.3 Clone Document Template

When you click a clone icon in *the Document Templates* screen, this dialog box opens:



This dialog gives you two options for saving a copy of the selected template:

- Save a new version of the selected template (as an incremental step in its development)
- Save a copy of it as a new template (i.e., clone it).

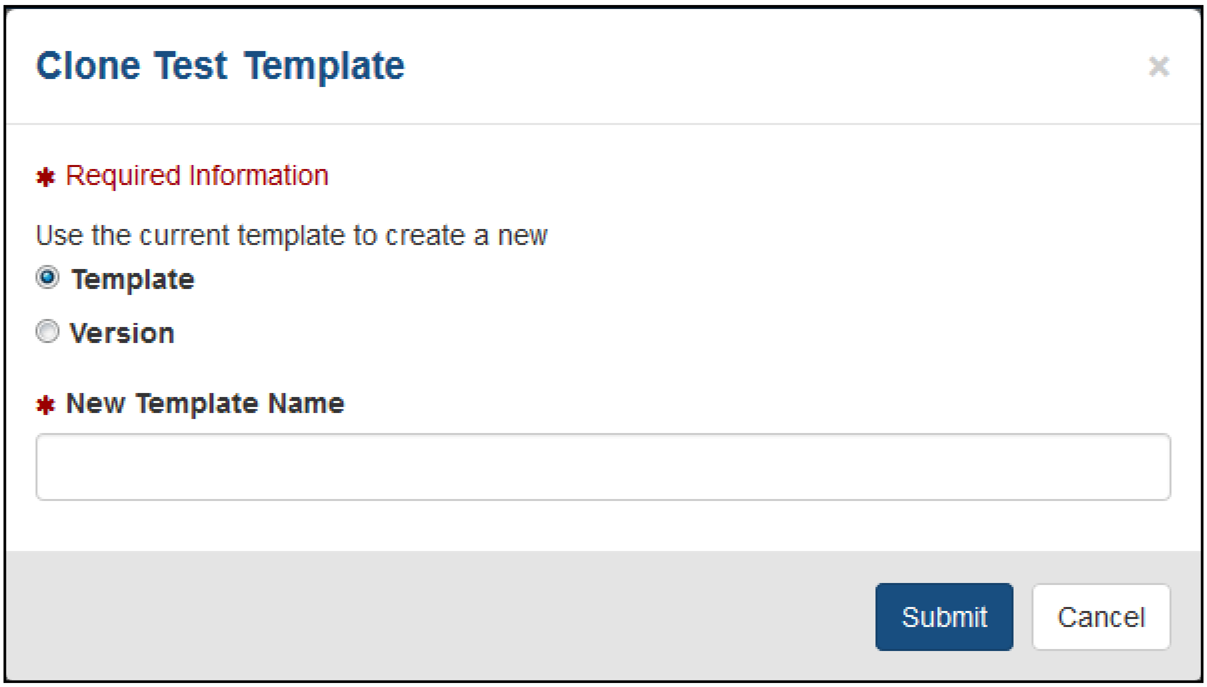
Make your selection and click **Submit**.See below for more information on these options.

Create New Version

a. If you chose to create a new version of the template, the template opens for editing in the Document Template Key Attributes screen with the *Version* field set to the next incremented version number.
b. Make further changes to the new version as you wish.

Create New Template

If you chose to save a copy as a new template, this dialog box opens:

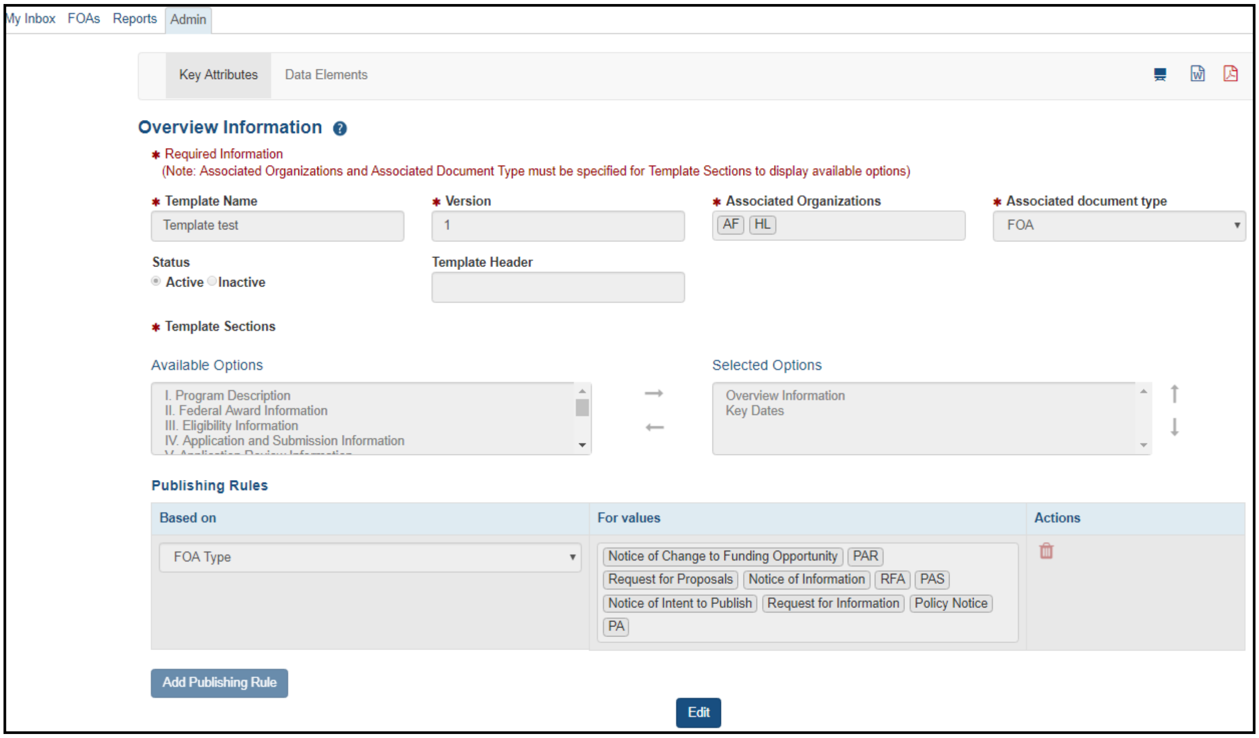


a. Enter a new name for the cloned template, then click **Submit**.
b. The new template opens for editing in the Document Template Key Attributes screen. Make further changes to it if you wish.

8.4 Document Template Key Attributes

Document templates define which named sections are included in documents such as FOAs and Notices, and define certain attributes of those sections, such as position and publishing rules.

Use this screen to view and edit document templates.



This screen opens in read-only mode. To edit the template, click the **Edit** button.

Then you can configure these template attributes:

- **Template Name** — Enter a unique name for the template.
- **Version** — Set the current version of the template.
- **Associated Document type** — Select the document types that can be associated with the template (control+click to select multiple types).
- **Associated Organizations** — Select the organizations that can use the template.
- **Status** — Set the publishing status of the template: Select *Active* if the template is available to be associated with documents, select *Inactive* if it is not available.

- **Template Header** —Indicates the type of header that will be used on the export document (DHHS - NIH) Enter text that will be displayed in the header of the FOA export document (HTML, Word, and PDF)

- **Template Sections** — Use these two panes to choose the named sections you want to include in the template, and then arrange them in the desired order, as shown here:

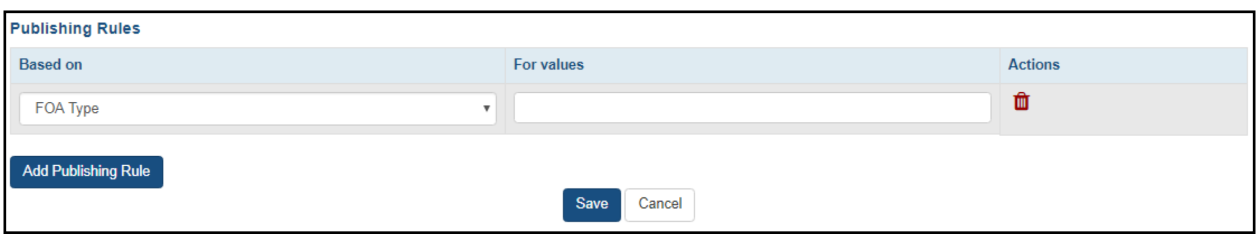
1. Scroll through the *Available Options* pane and click on sections you would like to include in the template, then click the right-pointing arrow to move them to the *Selected Options* pane.
2. Likewise, to remove sections from the template, select them in the *Selected Options* pane and click the left-pointing arrow to move them back to the *Available Options* pane. (But note: You cannot remove a section if it already has a data element associated with it.)
3. Then arrange the template sections in order: Click on sections in the *Selected Options* pane and use the up and down arrows to arrange them in the desired order.

Publishing Rules

Use to define automatic publishing rules that govern whether the template can be associated with a given FOA, based on the FOA's key attributes.

Follow these steps to create a publishing rule:

1. Click **Add Publishing Rule** to open the configuration tool, as shown here:



2. Set these two attributes:

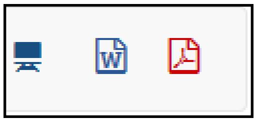
- **Based on** — Select an FOA attribute, such as Activity Code or FOA Type.
- **For Values** — Enter one or more possible values for this attribute: The template will only be available for use with FOAs that have one of these values.

3. To add another rule, click **Add Publishing Rule** again to add another row to the grid, then configure it as above.
   Note: You cannot create more than two publishing rules to a template.

NOTE: ACF and CDC users can only add one publishing rule to a template, and the only available **Based On** attribute is FOA Type.

When you finish configuring the template, click **Save** to save it.

8.4.0.1 Preview Template



Use the preview buttons in the menu bar to preview the template as an HTML, Word, or PDF Document.

Next Steps

When you have finished configuring the attributes, sections and rules of the document template, save the template and click *Data Elements* in the menubar to open the Data Elements screen and view, add or edit the data elements in the template.

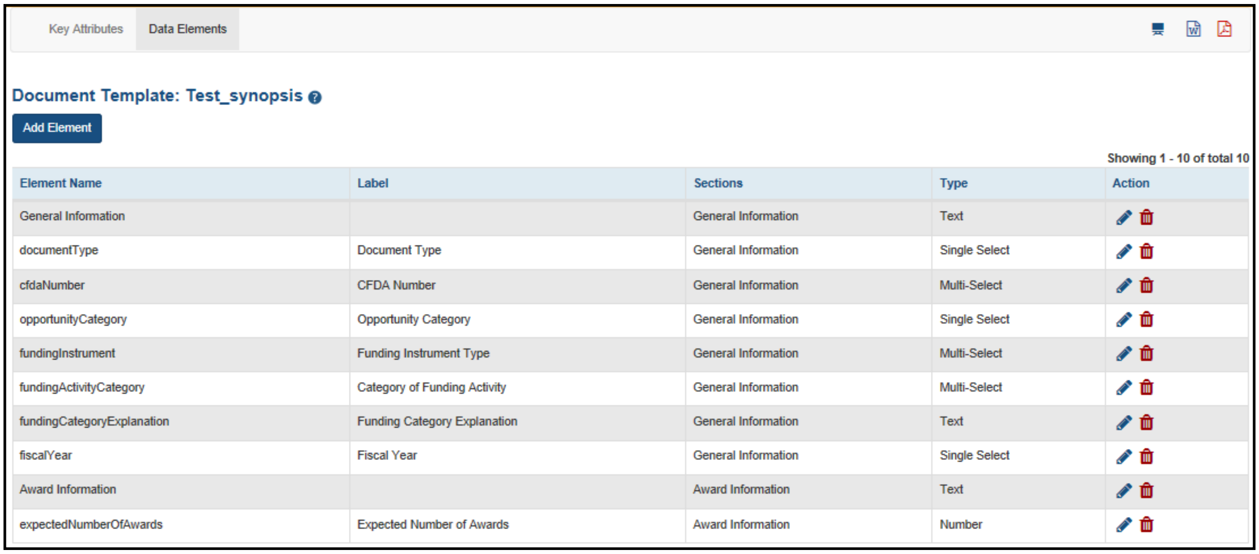
8.5 Data Elements

The Data Elements screen lists all the data elements in the document template.

This screen opens when you click the Document Template **Data Elements** tab, as shown below.

You can take the following actions in this screen:

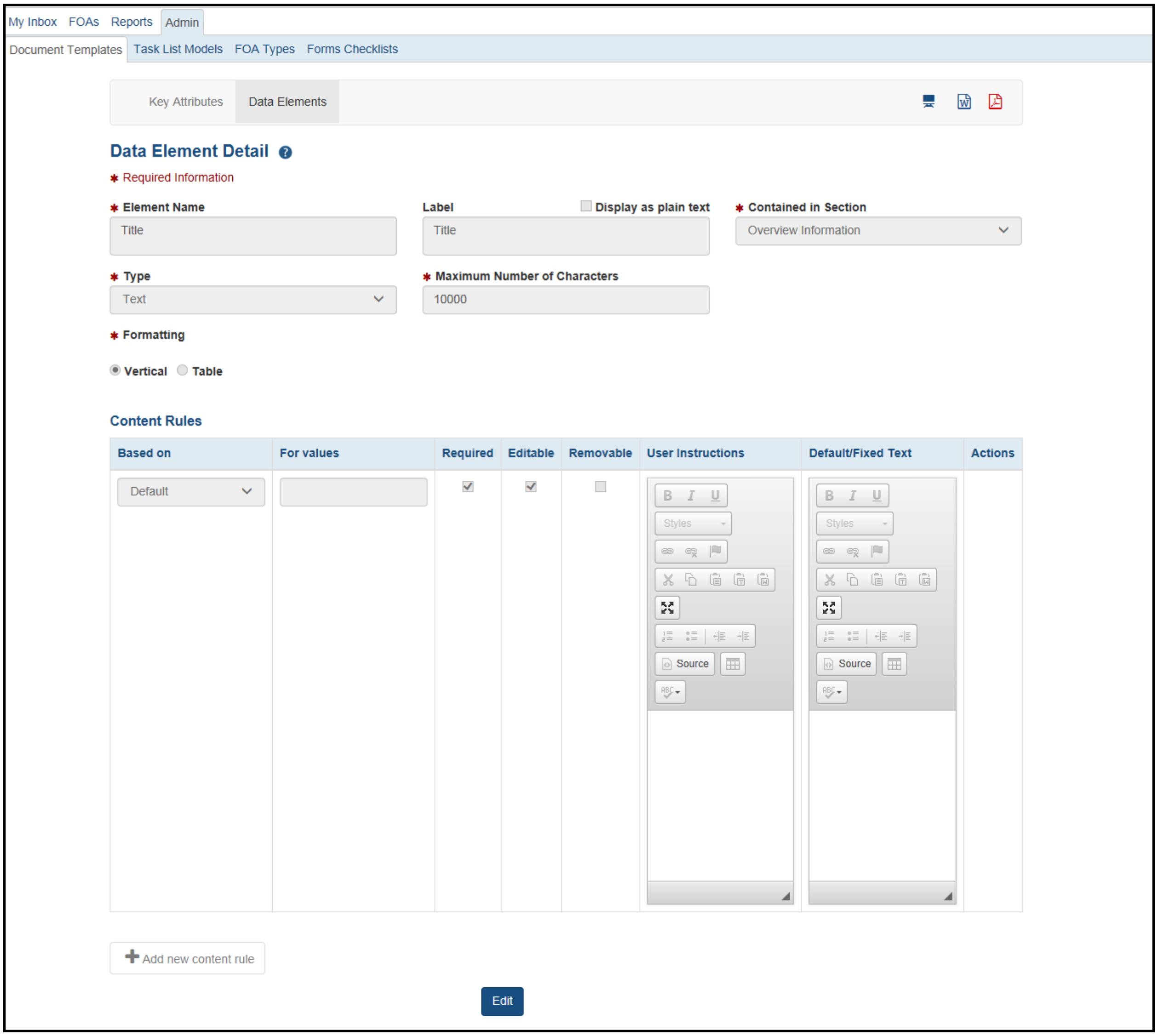
- Click **Add Element** to create a new data element in the Create Data Element screen.
- Click the pencil icon to view or edit a data element in the Data Element Detail screen.
- Click the trash icon to delete a data element.
- Drag and drop elements within the list to define the order in which they will appear.
  Note: you can change the order of elements within a template section, but you cannot move elements from one section to another.



Element Name	Label	Sections	Type	Action
General Information		General Information	Text	
documentType	Document Type	General Information	Single Select	
cfdaNumber	CFDA Number	General Information	Multi-Select	
opportunityCategory	Opportunity Category	General Information	Single Select	
fundingInstrument	Funding Instrument Type	General Information	Multi-Select	
fundingActivityCategory	Category of Funding Activity	General Information	Multi-Select	
fundingCategoryExplanation	Funding Category Explanation	General Information	Text	
fiscalYear	Fiscal Year	General Information	Single Select	
Award Information		Award Information	Text	
expectedNumberOfAwards	Expected Number of Awards	Award Information	Number	

8.6 Data Element Detail

When you click on the pencil icon for an element in the Data Elements tab, the Data Element Detail screen opens, as shown here:



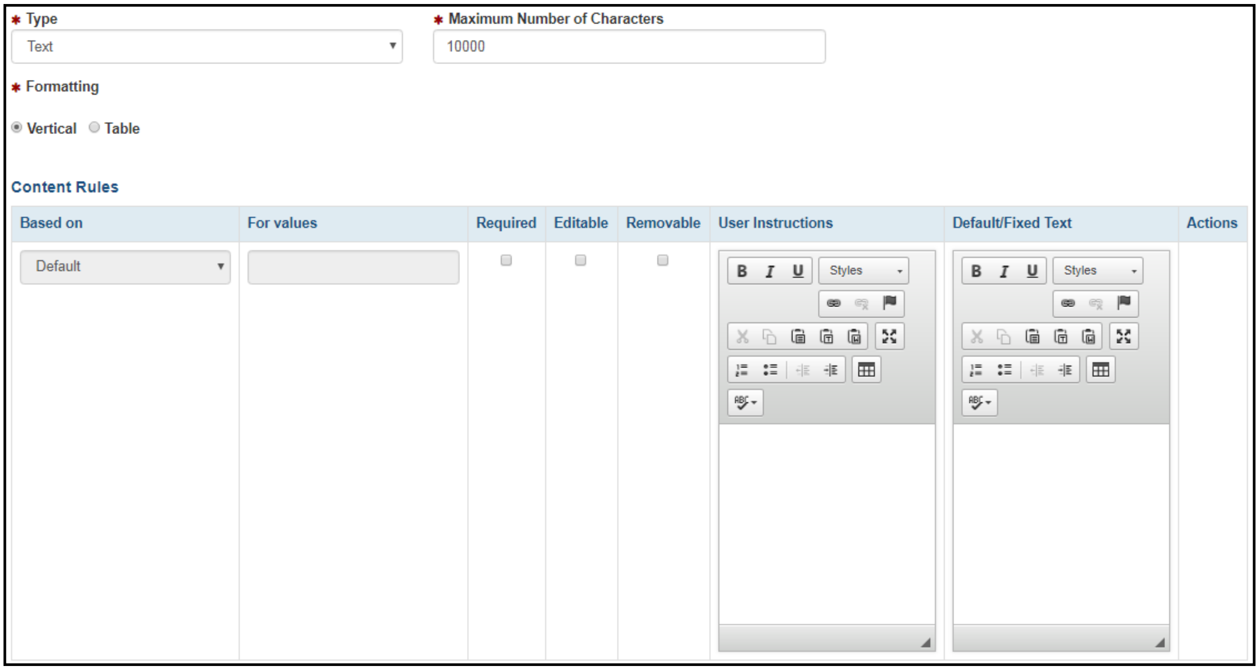
This screen opens in read-only mode. To edit the data element, click the **Edit** button.

Use this screen to define the attributes of the data element.

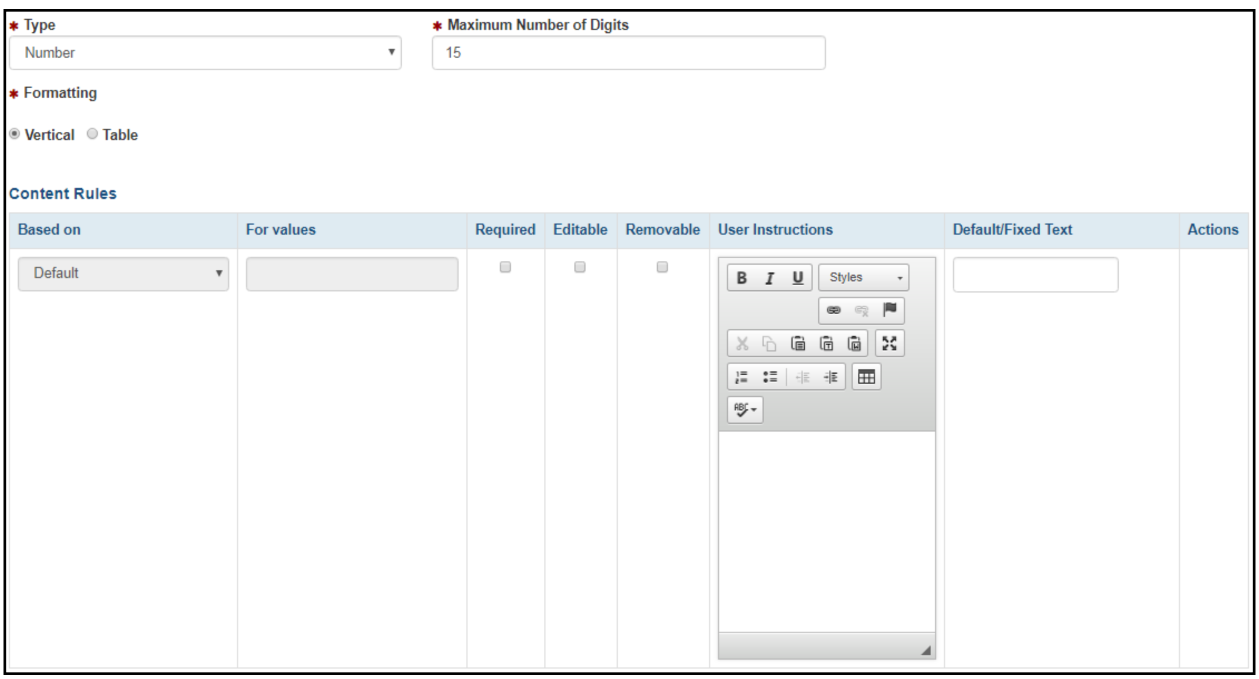
But note that this screen has different fields and configuration tools for different element types.

1. So first, select the element **Type** from the drop-down menu and FOAM will load the proper editing tools for that type, as shown here:

Text, Contact and Link elements:



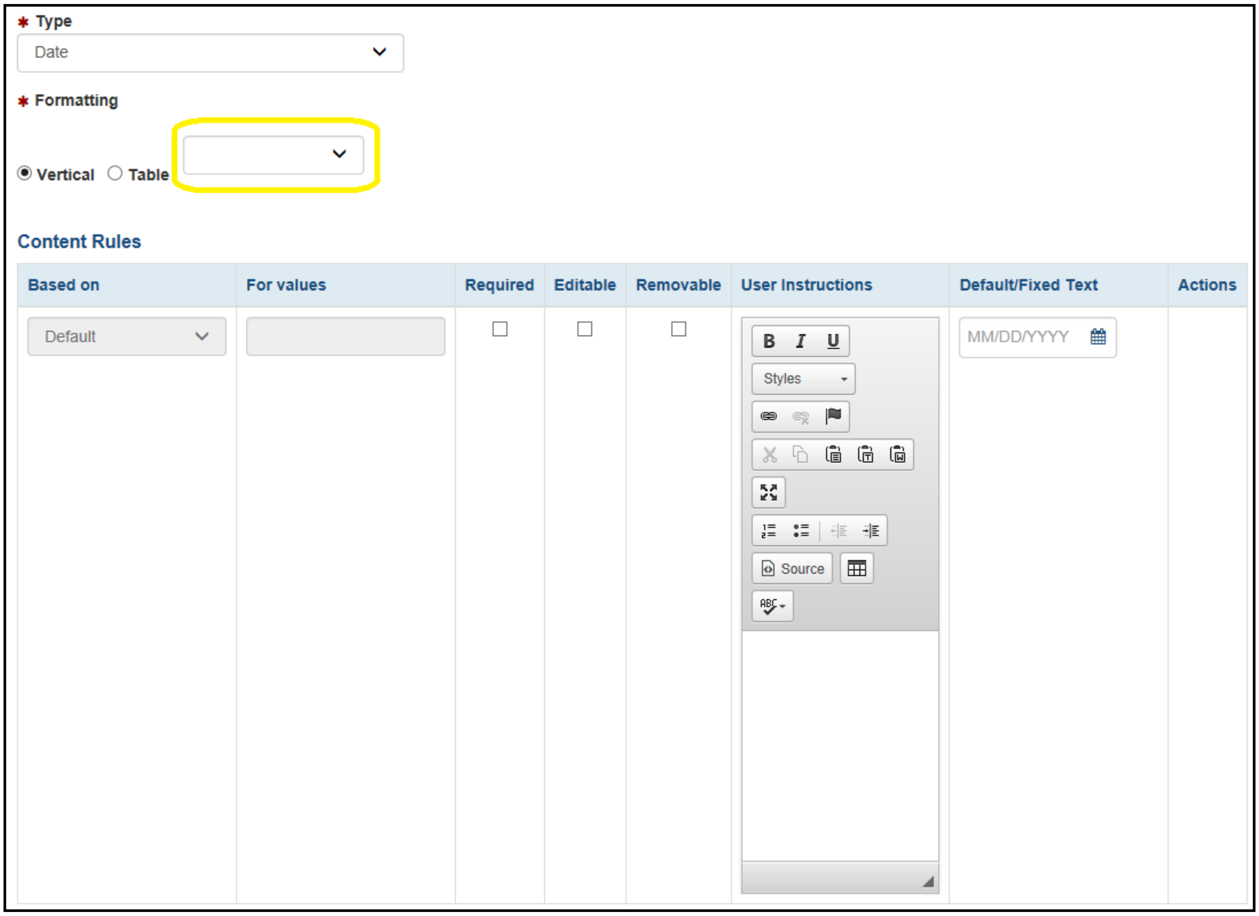
Number elements:



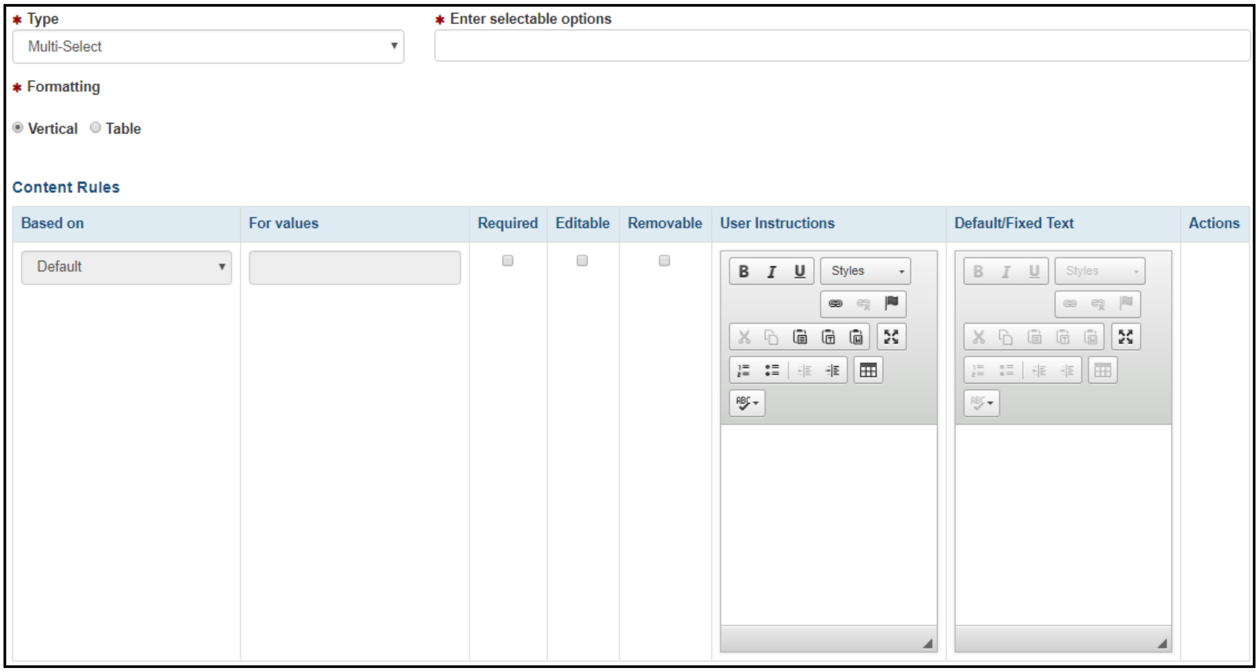
Date Elements

When you set the Type field to *Date*, a drop-down menu appears in the formatting area, as shown below:

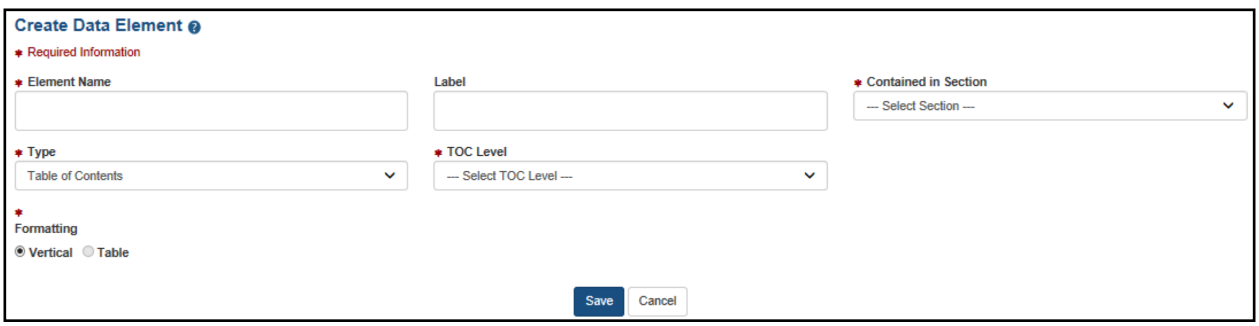
Use it to select the date format (DD/MM/YY, etc.), then configure the other properties as described below.



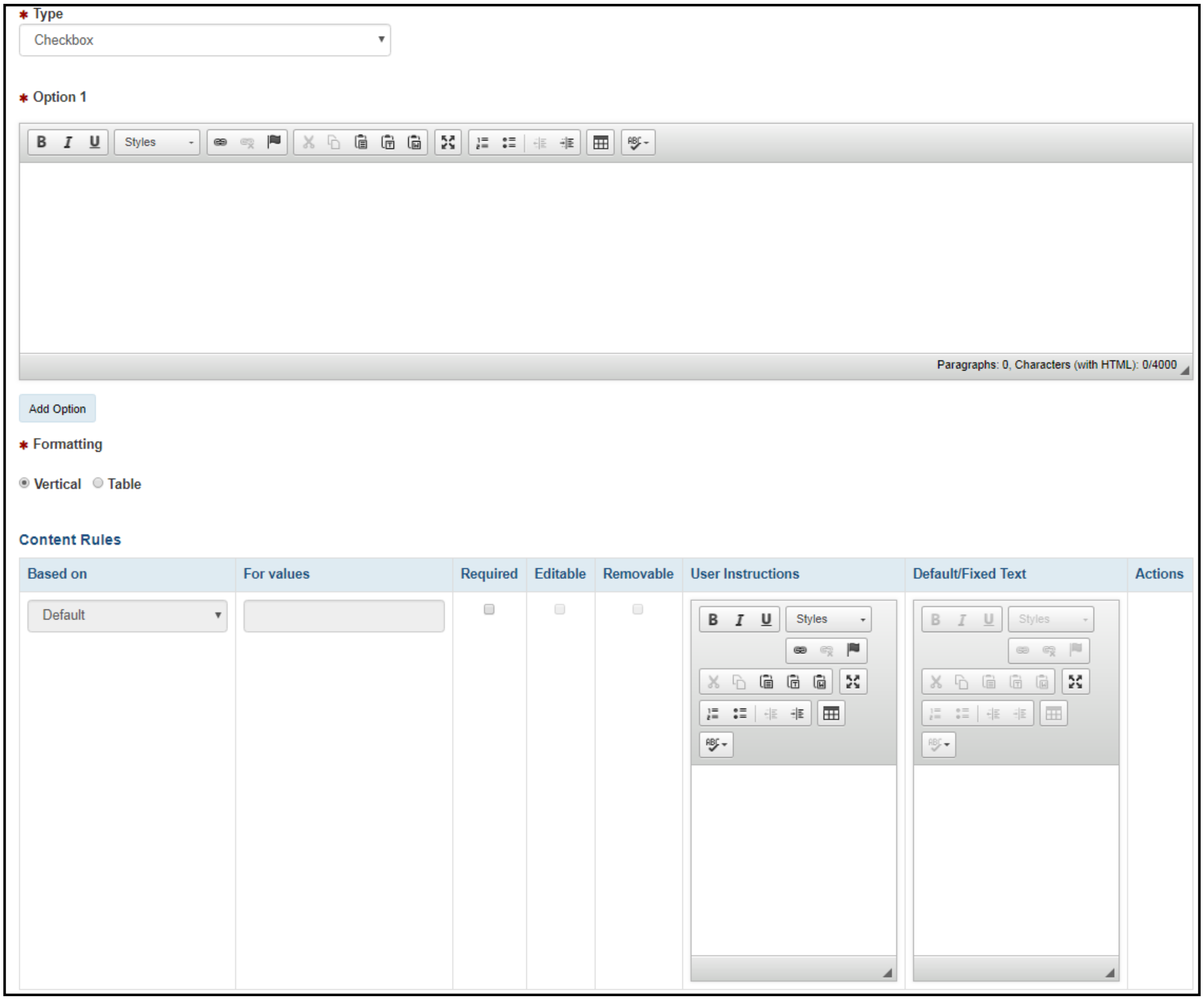
Single-Select and Multi-Select elements



able of Contents elements:



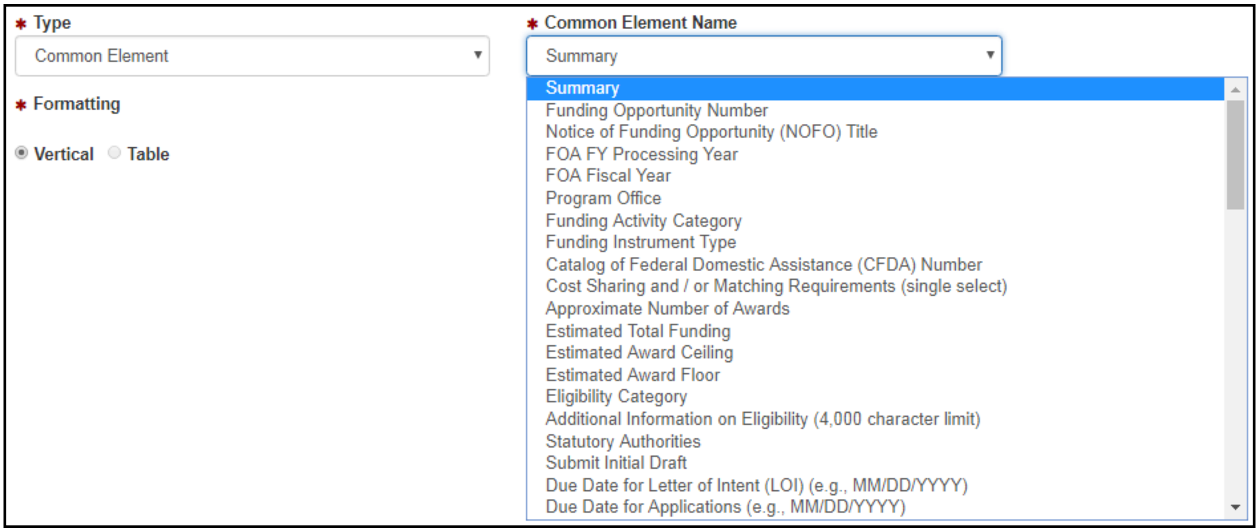
Radio Button and Checkbox elements:



Common Element

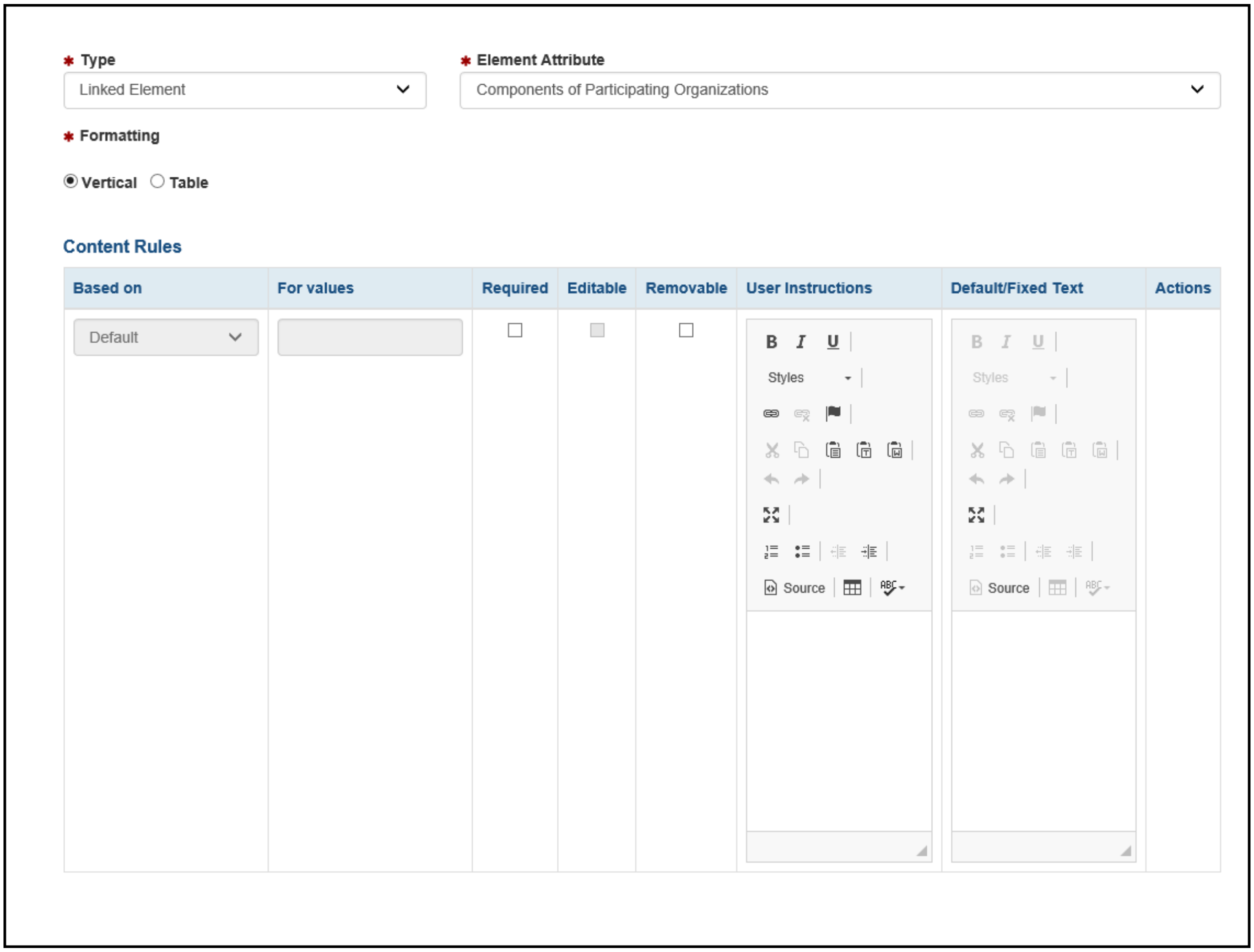
Common elements are predefined elements that you select from a shared library available to users in your organization.
To use common elements, your organization must first create and publish a [Common Element Library Template] with data elements in it.

Once such a template is published, you can select elements from the *Common Element Name* drop-down menu, shown here:



Linked Element

A linked element inserts the value of he FOA attribute it's linked to, along with a label that you create.

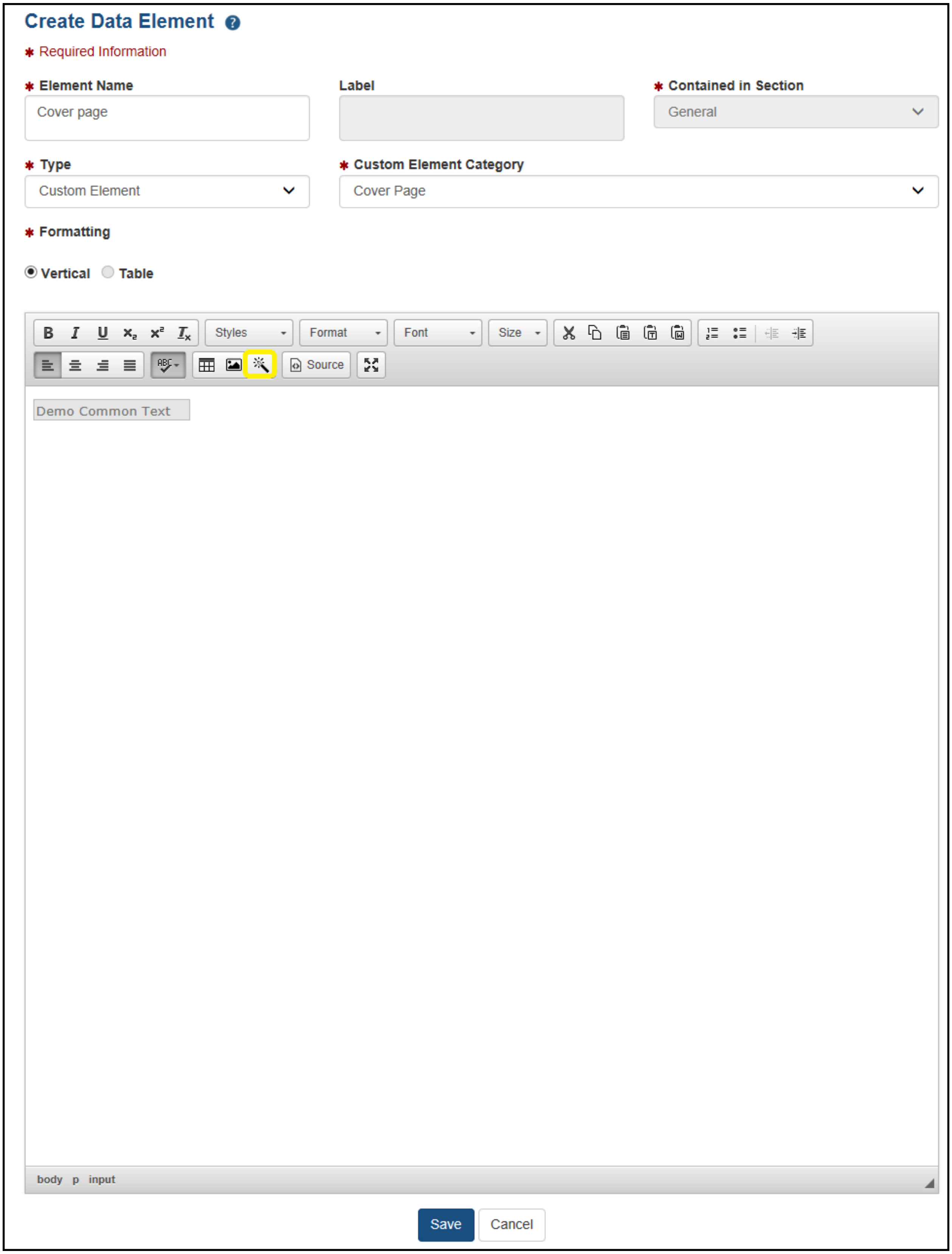


Cover Page elements

A cover page is a category of custom element that allows you to create a page that includes:

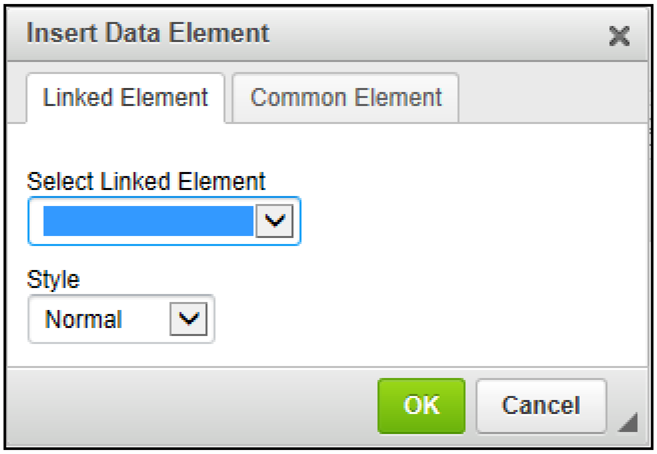
- logos and other images
- Common elements (fixed or editable text and numbers)
- Linked elements (text drawn directly from the FOA, such as FON, Title, CFDA, etc.)
- Text

Cover Page is displayed in previews and PDF/Word exports.

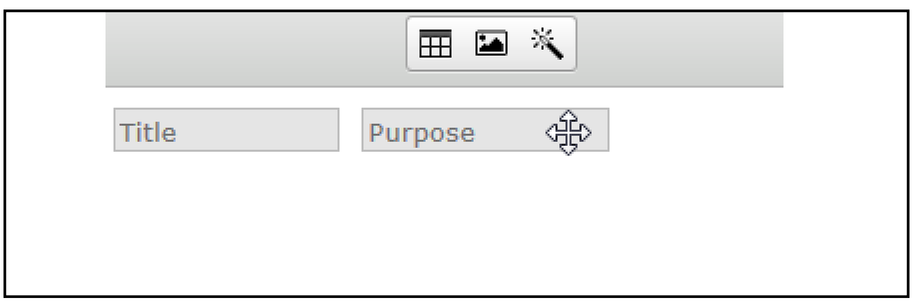

Create Data Element
* Required Information
* Element Name
Cover page
Label
* Contained in Section
General
* Type
Custom Element
* Custom Element Category
Cover Page
* Formatting
Vertical
Table
Styles
Format
Font
Size
Source
Demo Common Text
body p input
Save
Cancel

Use the  wand tool to add elements:

1. Click the wand to open a pop-up Insert Data Element window:



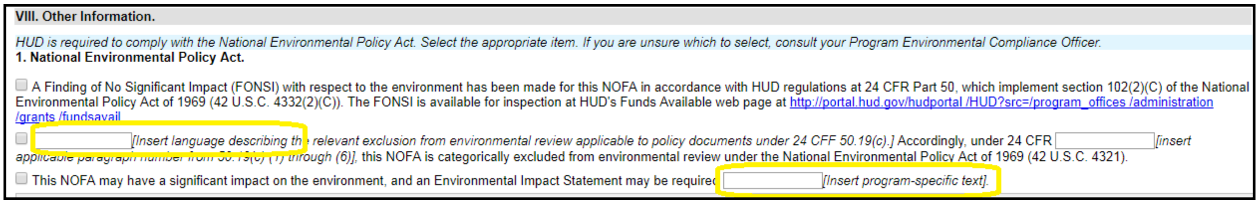
1. Use the drop-down menus to select the type of common or linked element you want to add, then click OK to create the element.
2. New elements appears in the top of the field.
3. If you want, you can drag-and-drop the elements into a different order:



then click the spot where you want to place the new element.

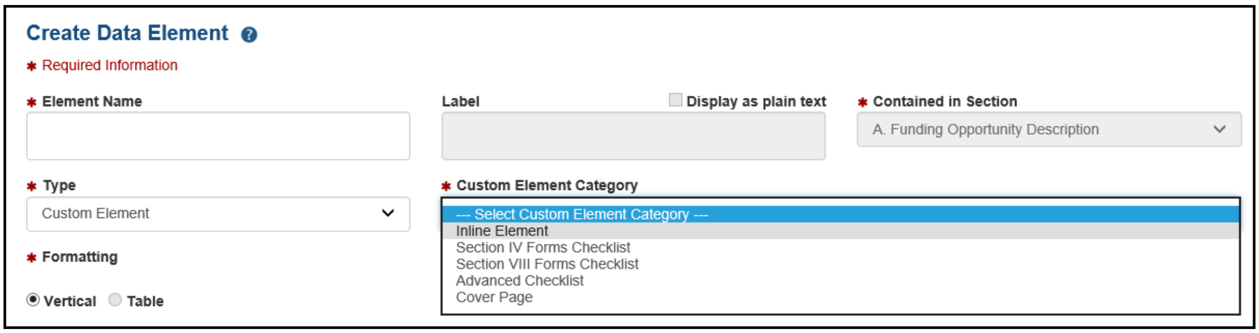
Inline elements

Inline elements are text entry fields that are placed inline with surrounding explanatory text that tells the FOA author what information to enter in the field, as in this example:



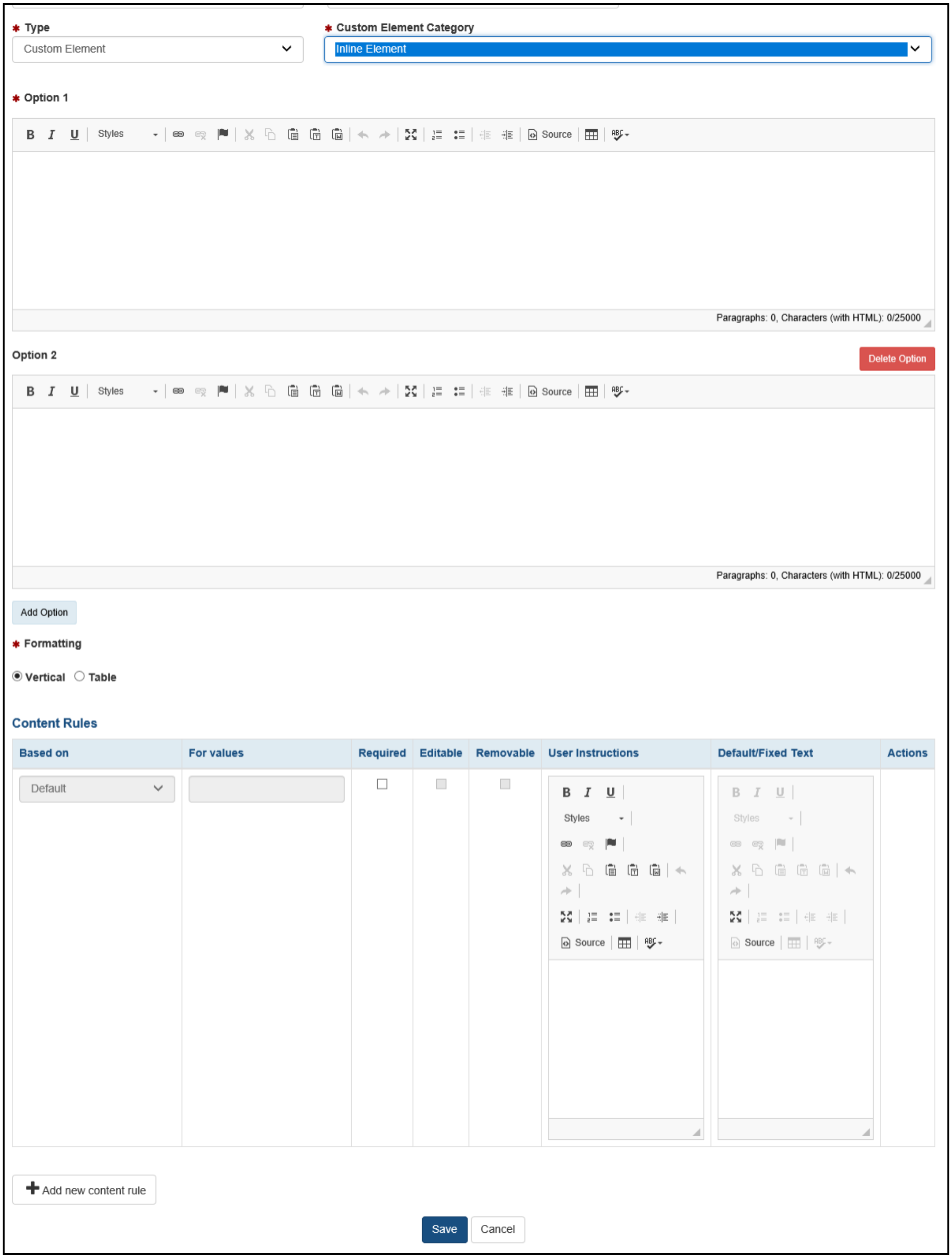
Follow these steps to create an inline element:

1. In the *Element Type* field, select "Custom Element."
2. When you select *Custom Element*, the *Custom Element Category* drop-down menu appears, as shown here:



3. In the *Custom Element Category* menu, select "Inline Element."
4. **Option 1** and **Option 2** input text boxes will appear in the screen, as shown here:

.



Type
Custom Element
Custom Element Category
Inline Element
Option 1
Styles
Source
Paragraphs: 0, Characters (with HTML): 0/25000
Option 2
Delete Option
Styles
Source
Paragraphs: 0, Characters (with HTML): 0/25000
Add Option
Formatting
Vertical
Table
Content Rules
Based on
For values
Required
Editable
Removable
User Instructions
Default/Fixed Text
Actions
Default
Styles
Source
Styles
Source
Add new content rule
Save
Cancel

5. Follow these rules for creating inline elements in the Option text boxes:

- To create a read-only text element with editable text box, enter text in the Option text box and type %INPUT_TEXT% where you want the editable text box to appear.
- To create a read-only text element with editable date field, enter text in the Option text box and type %INPUT_DATE% where you want the editable date field to appear.
- %INPUT_TEXT% and %INPUT_DATE% can be used as many times as needed in an Option text box.
- To make an Inline Element removable, enter %OPTION_REMOVABLE% in the Option text box at the beginning of the field, followed by text and (if needed) %INPUT_TEXT% and/or %INPUT_DATE% ;
- %OPTION_REMOVABLE% can be used only once in each Option text box: If you need multiple removable options, click the **Add Option** button and start another Option text configuration with %OPTION_REMOVABLE%;
- To create a read-only text element with editable text box or date field as a radio button option, enter %OPTION_RADIO% at the beginning of the field, followed by text with %INPUT_TEXT% or %INPUT_DATE% as needed.
- %OPTION_RADIO% can be used only once per Option text box, so to configure multiple radio button options, start each %OPTION_RADIO% in a new Option text box.

2. Then define the other attributes as described below and click **Save**:

   Note: Some text fields allow you enter rich (i.e., formatted) text: Enter text in these fields using the formatting tools just as in a word processing program, or cut-and-paste formatted text from MS Word.

Data Element Attributes

Field	Description	Notes
Element name	Enter a unique name for the data element	
Label	Enter the label for the element that will be used in the FOA Content edit screen.	And click the **Display as plain text** checkbox if you want the label to appear as plain text (by default, labels are in bold text).
Contained	Select The template section	

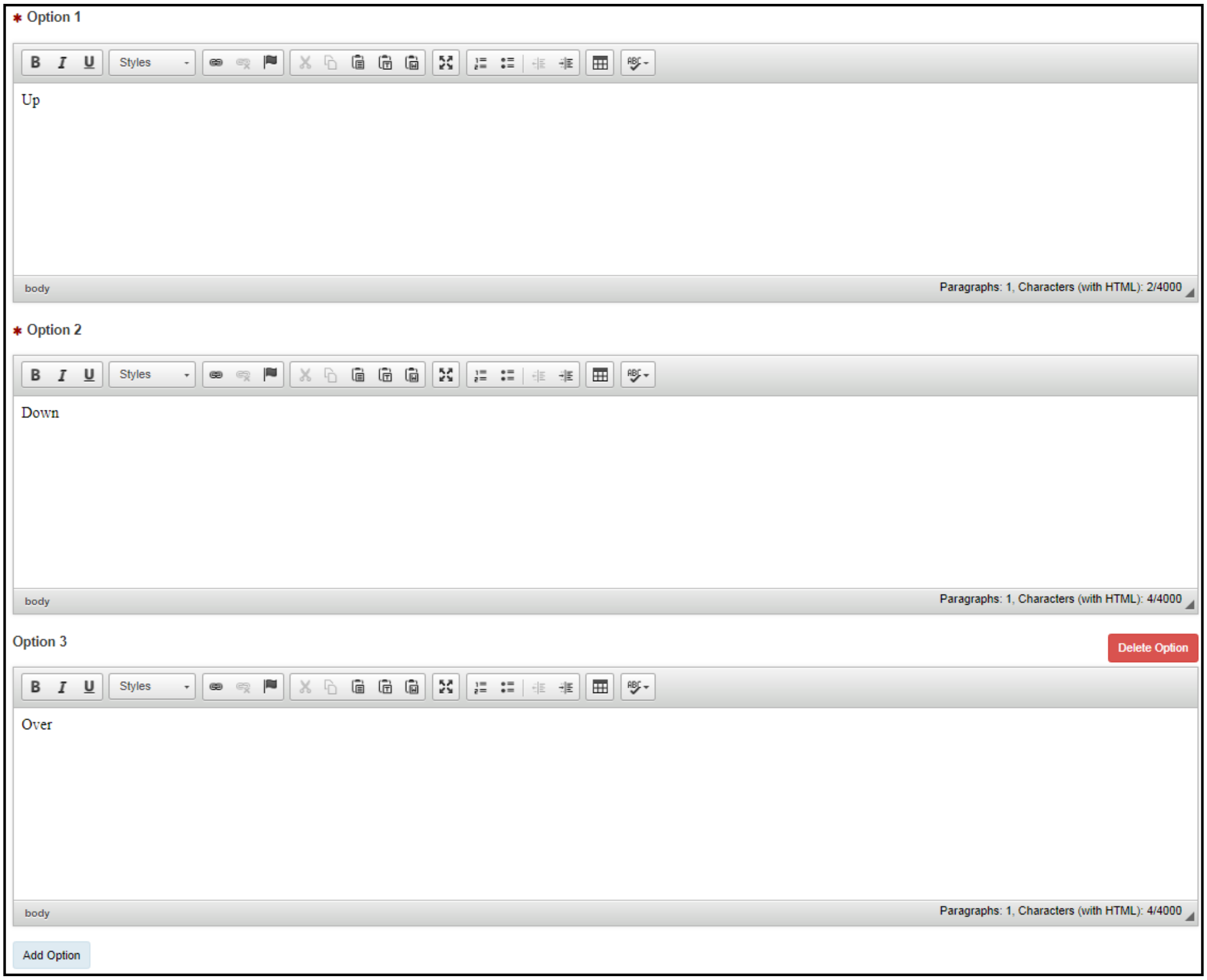
Data Element Attributes

Field	Description	Notes
in Section	where the element will appear	
Type	Select the data type of the input field	Choose text, number, date, text, number, contact, single-select, multi-select, table of contents, file attachment, link, common element, linked element or radio button If you select a type that gives the user multiple values to choose from (single-select, multi-select, radio buttons and checkboxes), an *Enter Selectable Options* field appears in the screen, as shown above.
Formatting	Governs how the element will appear on the *FOA Content* screen and in the published FOA document.	If "vertical" the content will appear below the label. If "table" the label and content will appear in side-by-side columns of a table
Option #	Enter the options the user can choose from.	The *Option* fields are only displayed for Checkbox and Radio Button elements. In the *Option 1* field enter the text of the first selectable option. Then click **Add Option** to add an *Option 2* field and enter the second option there. Repeat as need to add more option fields and define all the selections you need, as shown below:
Enter Selectable Options	For single Select and multi-select elements only: Enter the selectable values in this field	Enter some text and hit <Enter> to define the first value, type some more and hit <Enter>to define the next value, and so on to define all the selectable values.
Maximum number of characters	For text data elements, enter the character limit	Only displayed for text data types.
Common Element Name	For Common Elements, select the element from the drop-down menu.	See Common Element Library Template for information on creating a shared library of data elements that can be added to document templates.
Key Attribute	For Linked Elements, select the FOA key attribute to which this data Element is linked.	The value of the FOA attribute you link it to, along with a label that you create.

Option fields

Use these fields to define the selectable options for checkbox and radio button elements: Enter one option in each field and click **Add Option** to add more option fields to the screen, as shown here:

Enter one selectable option in each *Option* field and click **Delete** to delete options if necessary.



Content Rules

Use Content Rules to enter a default value or set rules for populating the element, or to add instructions for the user.

Note: Each data element includes a default content rule which will be used with attribute values for which no user-created content rule is applicable.

If you want to create a rule of your own rule, click **Add New Content Rule** to add another row to the grid, then use these fields to configure the rule:

Field	Description	Notes
Based on	Select a the key attribute the content rule is based on.	
For values	Enter the values of the key attributes for which the rule is applicable.	Multiple values are allowed separated by semicolon. Blank and can't be edited for the Default content rule.
Required	Check if the data element must be filled in before publication.	
Editable	Check if the element should be editable, leave unchecked for read-only.	
Removable	Click to allow users to exclude this element from FOA content exports (HTML, PDF, Word).	In the FOA Content screen, removable elements have a checkbox next to them: Users can check the checkbox to include the element in the export document, or uncheck it to remove the element from the export.
User Instructions	If you wish, add instructions that will be displayed in a tool tip.	
Default/Fixed Text	If applicable, enter the default value or read-only text.	

When you finish configuring the template click **Save**.

8 Quick Start Guides

Use these guides to get a quick start on some common FOAM tasks:

- Quick start guide: Creating an FOA Using the Research Template - docx (2/15/2018)
- Quick start guide: Creating and Submitting an FOA or General Notice for Guide Review - docx (2/15/2018)
- Quick start guide: Creating and Submitting an NOITP for Guide Review - docx (2/15/2018)
- Quick start guide: Creating and Submitting a CSR Receipt Date Request - docx (12/18/2017)
- Quick start guide: How Program Officials can Access an FOA in FOAM - docx (11/21/2017)
- Quick start guide: Signing onto an FOA or a Notice - docx (10/19/2017)
- Quick start guide: Exception Approval Process - docx (10/19/2017)